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Effective Customer Service For Printers & Graphic Arts Firms

by DON MERIT

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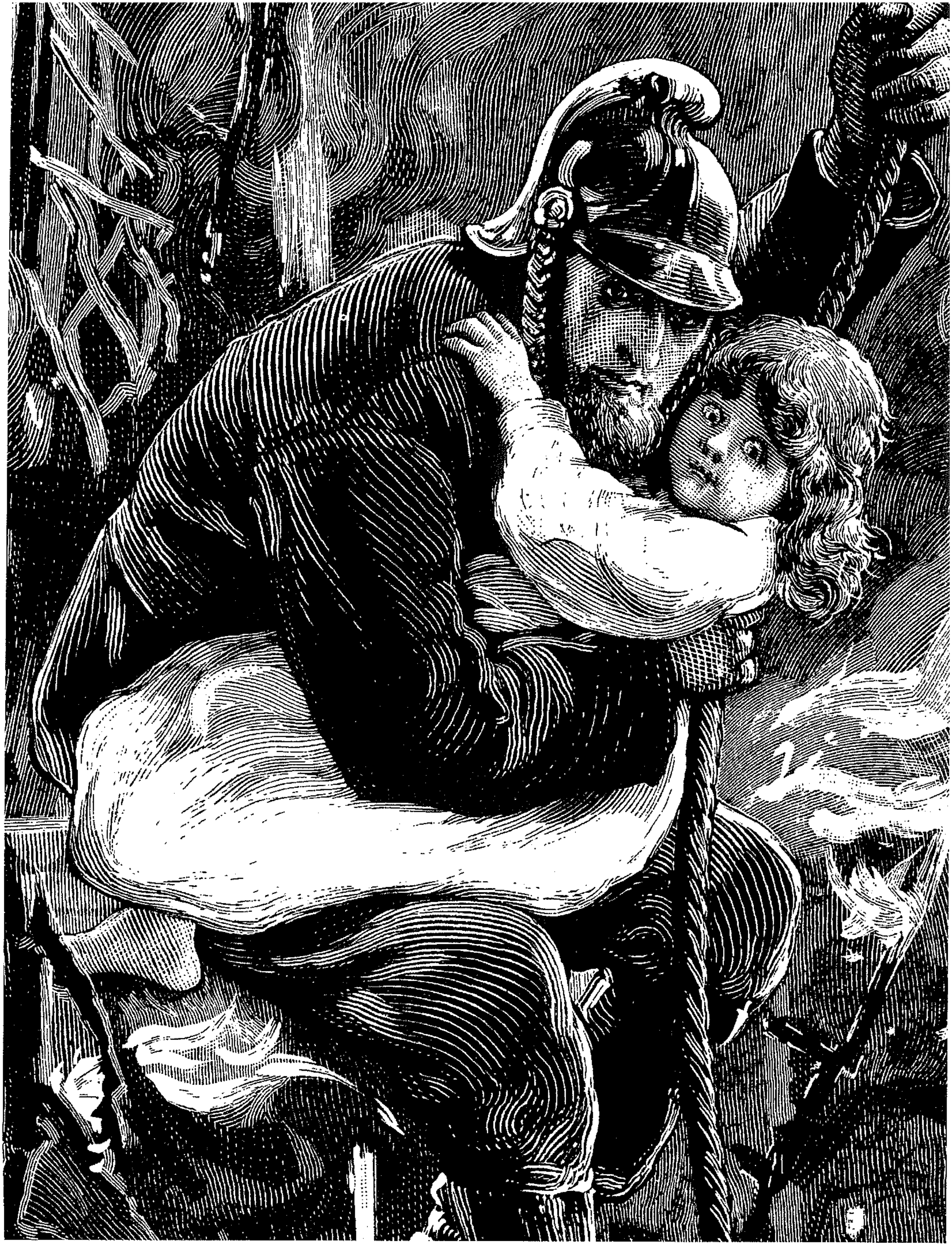
PREFACE

This is the second book I have written about customer service. The first was published in 1991 by Graphic Arts Publishing Inc., Livonia, New York. It's an okay book, but I have learned so much more since then that I had a strong urge to let it all out in book form.

The older book was 5-1/2 x 8-1/2, 28 pages plus cover, and contained only six chapters. This one is 8-1/2 x 11, 56 pages plus cover, and has 10 chapters. I drew a lot from the older book, but changed almost everything, I think, for the better. In addition, I added many new ideas and more information.

I wish to salute all customer service representatives in the graphic arts industry. Yours is not an easy job. To the extent that you manage to perform it well, you are a priceless asset to the industry. Stand ten feet tall.

Don Merit, Graphic Arts Consultant



CHAPTER 1

Qualifications Of Customer Service Representatives

Customer service representatives who lack the necessary qualifications should seek jobs in some other area.

Not too long ago, most printers did not employ anyone called "customer service representative" (CSR). They had (and still have) people called production coordinators or job planners. Their duties often included writing job jackets, planning jobs, creating press layouts and impositions, checking proofs and press sheets, keeping inventories, ordering paper and ink, purchasing outside services, routing drivers and messengers, and whatever else no other person had been appointed to do. In addition, they had to deal with customers and sales representatives.

While doing all of these things, production coordinators were required to abide by this primary rule of all printing companies: *"No matter what else you are involved in, you must never, ever keep a press waiting."* As a result of this rule, and the large variety of tasks production coordinators had to perform, a ringing telephone was an unwanted interruption in their minds. They never answered with a smile in their voice. No matter that the words they spoke were polite, their tone of voice clearly stated, "Why are you bothering me now? Can't you tell I'm busy?"

Customers could not help but sense this hostility. They complained to their sales representatives. The sales reps rushed to management and declared, "I don't want you to allow those gruff production people to speak to my customers ever again." Management responded by hiring people, usually fresh out of school, with friendly personalities and pleasant telephone voices. But real life experience proves that these traits are far from sufficient. A more complete set of qualifications is required. Turn the page to see a more comprehensive list of requirements:

They are sympathetic to peoples' problems.

When a customer calls with an urgent problem, customer service reps cannot be thinking, "That's no skin off my nose. That doesn't really affect me. What do I care?" This lack of real concern is easily discernible, even over the phone. Moreover, it does not lead to the kind of action by the CSR that the situation requires.

They have nice personalities. They are always polite, courteous, attentive, and friendly.

Customers like doing business with people who are nice to them. Be nice, and they are more likely to come back. Be nasty, and they will surely look elsewhere.

They have pleasant telephone voices.

What a difference there is between a grumpy, "Whaddya want?" and a cheerful, "How may I help you?"

They are good communicators.

They understand exactly what the customer wants and what the sales representative is saying. They convey that information to plant personnel accurately, and in language that is comfortable for production people. When needed, they know how to probe for additional information. Furthermore, they can sense when others do not fully understand what they are saying, or when others are saying, "Yes, okay" to them when they don't really mean it.

They have a great capacity for self control.

Customers become angry when things go wrong. Many of them find it necessary to yell, and, naturally, they have to yell at whoever it is they are talking to. Very often, that's a customer service rep. CSRs cannot allow themselves to become upset or angry. They must remember not to take it personally. They should not yell back, or even argue. Customers are yelling at the situation, and at the company as a whole, not at the CSR specifically. CSRs must maintain self control, and remain polite at all times. But if customers become thoroughly abusive, and use indecent language, it is perfectly alright for CSRs to say something like, "I'm going to hang up now. Please feel free to call me back when you are ready to engage in a polite conversation. I will do my best to help you at that time."

They are good negotiators.

Customers/and or sales representatives want to have something done. These things seem reasonable to CSRs. They convey the requests to production personnel, and the response oftentimes is, "No way. It will never happen" CSRs cannot simply go back to customers and/or sales reps and say, "I'm sorry. Our production department says it can't be done." This is a time for some skillful negotiating. CSRs try hard to get production to agree to do it. If that doesn't work, they should get production to say what they are able to do. Then they should go back to the original request makers, and present that solution in a most agreeable light.

Very often, customers make requests that make no sense to people who know printing. It could be the wrong kind of paper for that kind of printed piece. It could be a request for varnish, when it takes UV coating to do the job. Or it could be the other way around. The customer may be requesting UV when varnish would be totally adequate. CSRs should be able to negotiate customers into changing their minds in the interest of getting better value and/or a better product.

They are reliable. They do what they say they will do.

CSRs need to come to work every day, and on time. When they say they will call back in ten minutes, they do call back in ten minutes, or sooner. When they agree to get something done, whether it be for customers, or sales reps, or production personnel, they do get it done.

They welcome responsibility.

Sales representatives are out there in the cruel, competitive world fighting to win orders. When they do land a job, they don't need to be confronted by sour-faced CSRs complaining about how much more work that order means for them. On the contrary, the CSRs should jump up, congratulate the sales reps for having landed the order, and assure them that, as CSRs, they will do everything necessary to help shepherd the job through to a successful completion.

They are able to make quick and correct decisions under pressure.

Customers spend time on the phone carefully explaining the problem and what needs to be done. When the response is, "I'll have to check with my manager," they become justifiably annoyed. One can imagine them saying under their breaths, "Why wasn't I told to talk to the manager in the first place?" Customer service reps should know their companies' policies. They should understand what they are — and are not — allowed to do for customers. Armed with that knowledge, they should be able to make right decisions on the spot, and have the authority to implement those decisions.

They are not clock watchers.

Printing is not a 9:00 A.M. to 5:00 P.M. environment. If something has to be taken care of before or after "normal" hours, well, that's just the way it is. That goes especially for checking and transmitting proofs, and for press okays. It also applies to getting new orders into the works when the delivery date requires it, or when there are people in the plant standing idle waiting for jobs to work on.

They are not gamblers.

If the specifications are not complete, CSRs cannot gamble and take a guess at what the right answer might be. If the purchase order does not say how the pieces pack, that does not necessarily mean that it's okay to pack in convenient cartons. If it doesn't say where the job delivers to, it does not follow that it should go to the customer's home location.

They are self-motivated.

Nobody can watch customer service reps on the job, and know whether they are really doing what they are supposed to be doing. CSRs can make themselves look good by shuffling papers, or by walking quickly from one place to another with a meaningless piece of paper in their hands. Management has to depend upon its CSRs to want to be doing the right things at the right time. The desire to do a good job has to come from within the CSR. It cannot be imposed from the outside.

They have good organizational skills.

New orders do not, as a rule, arrive at printing companies in the most organized fashion. Very often, jobs come in piecemeal, the instructions make little sense, information is missing or inaccurate, fonts are not supplied, copy is not properly labeled, proofs are missing, and more, and still more, can be, and is, wrong. It takes patient, well organized people to create order out of these messes.

They are flexible. They can juggle a variety of tasks at the same time.

It's not like being a factory worker on a production line. Life does not permit CSRs to pick up one thing, and finish it before they start on the next thing. On the contrary, they have to be able to begin a task, answer the phone in the middle of doing that, carry out the actions that follow from the phone call, stop to talk to sales people or answer questions from production, and remember what they originally started on, and where they left off after all the interruptions have been handled. But the interruptions cannot be thought of as interruptions. They are an integral part of the job. They happen all the time.

They are detail oriented.

Almost all sales representatives hate to handle details. If they did, they would not have become sales reps. They would be estimators, or job planners, or even customer service reps. Most sales reps do not do well at obtaining job specifications. Neither do most of them have the patience to put things in writing. Inevitably, CSRs inherit the task of getting all the details, putting them in order, and keeping track of them.

They have a sense of urgency.

All printing jobs have to be delivered by a certain time. If that were not the case, they would not be ordered in the first place. Somebody has to learn when that time is, and convey it in clear terms to the person in charge of scheduling. CSRs must move at the pace required by each situation. As a rule, they cannot allow jobs to sit still on their desks waiting to be processed.

They are good team players.

Nobody in the printing business is able to produce an entire job all by himself or herself. This is certainly true of CSRs. They must depend upon customers and sales reps to supply them with the necessary information. They must depend upon estimators to calculate costs. They have to count upon factory people to perform the actual work. And it works the other way around as well. All of those people cannot perform their functions unless CSRs perform theirs.

They know a lot about printing, and are willing to learn more.

The biggest single complaint that production people have against CSRs is that many of them know so little about printing. Instead of spreading clarity, they cause confusion. When customers or sales reps ask for something, CSRs must understand what is being said, and know how to respond. Inevitably, lack of technical expertise by CSRs will leave customers feeling insecure, and irritate the production staff.

They know something about postal regulations.

CSRs should know enough about postal regulations to understand that they have to be on guard whenever anything is slated for mailing. Lacking the necessary knowledge, CSRs could participate in processing an order that is not mailable. For example, a 3 x 5-inch card is too small to fit post office automated equipment. It has to be at least 3-1/2 inches high and 5 inches long. Otherwise, it will be returned to the sender.

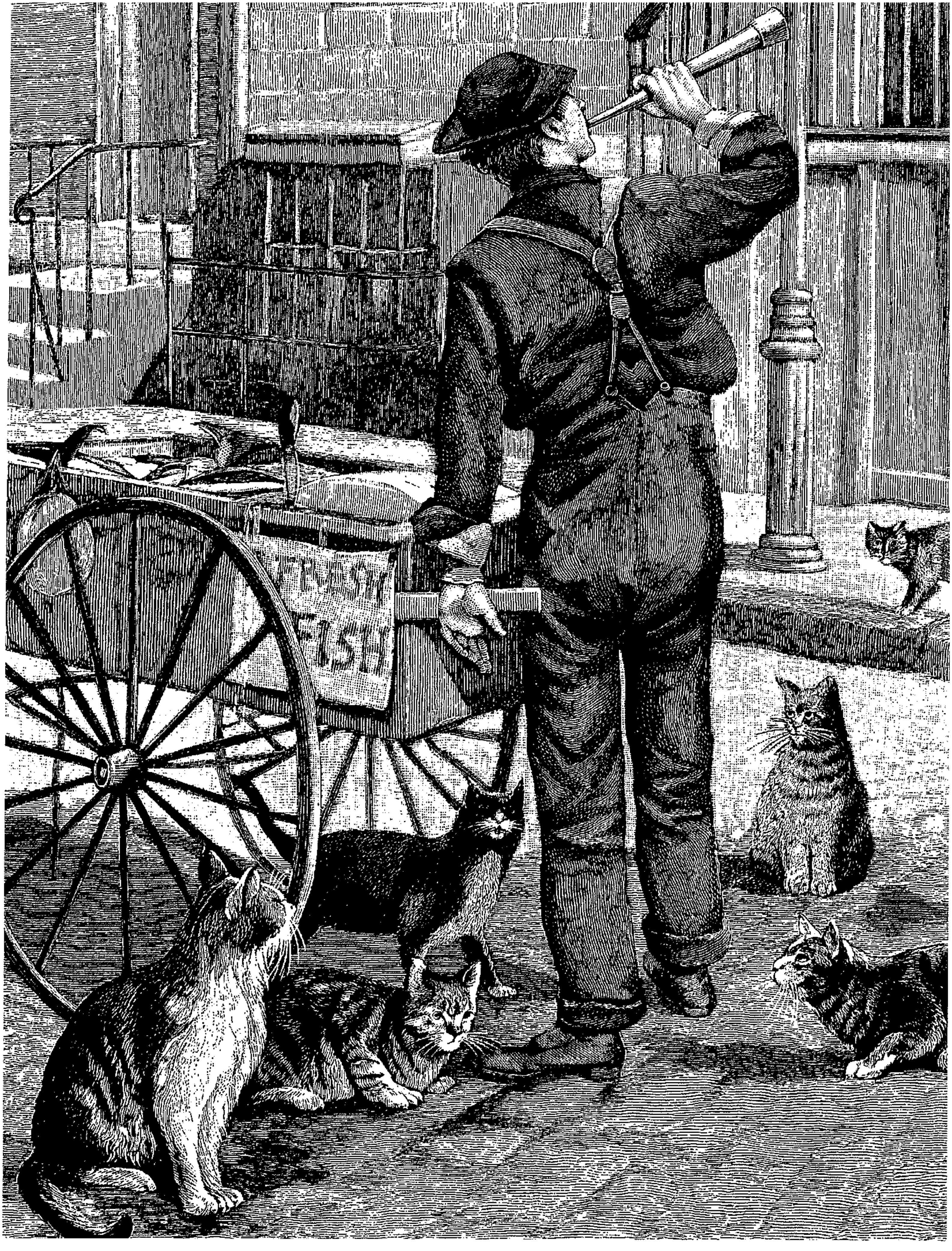
They have courage.

CSRs have to be brave enough to tell customers and sales reps what is and what is not possible. They must have the courage to fight with production for the needs of their customers. They certainly must be bold enough to inform upper management of whatever is taking place that causes customer dissatisfaction.

They are problem solvers. They can help figure out ways to prevent the same bad things from happening over and over again.

Certain mistakes have a way of occurring again and again. Proofs go out with obvious errors. Packages are not labeled properly. Jobs are delivered late. The longer these things are allowed to happen, the greater the number of customers who will take their business elsewhere. CSRs should be sensitive to what displeases customers, and be able to help find ways to eliminate the causes.

Customer service reps who lack more than just a few of these qualifications should do themselves and their fellow workers a favor. They should seek jobs in other areas. But if they lack no more than just some of the requirements, this list helps them learn what they need to work on in order to become better CSRs. If they have all of the qualifications, they should stand 10 feet tall before their supervisors, and inquire, "Haven't you been forgetting something?" When asked, "What is that?" the CSRs response is, "The raise I deserve because of the many qualifications I have."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CHAPTER 2

Winning Customer Loyalty

Find out what your customers want.
Then give it to them.

In 1990, Doubleday published a wonderful book on customer service. The title is *Customers for Life: How to Turn That One-Time Buyer into a Lifetime Customer.* The primary author is Carl Sewell.

Sewell inherited a car dealership in Dallas, Texas. He decided he wanted to be Dallas' number one car dealer. He sensed that, in order to do that, he had to satisfy his customers. He also sensed that, in order to satisfy customers, you need to know what they want.

Thus, the title of Chapter 1 reads: "Ask your customers what they want...and give it to 'em." On page XIX, he describes how he went about finding out what his customers wanted:

"...We started asking customers what they didn't like about doing business with us, and they told us, quite often without mincing words. They found the service hours usually 8 A.M. to 5 P.M. Monday through Friday inconvenient. They thought some of our employees were rude, they hated being without a car while the dealership was working on theirs, and worst of all they often had to bring their car back a second or third time to get a repair done right."

Then he took action. Here is what he did: He provided free loan cars. He started with five loaners and eventually the fleet grew to 257. He provided all day Saturday service. He extended week day hours, opening at 7:30 A.M. and closing at 8:00 P.M. Later on, as an additional service, he had his drivers deliver loaners to customer homes, and drive the customers' cars back to the shop. After the work was done, they delivered the cars back to the customers, and picked up the loaners.

In addition, when a customer brought a car back that was not properly repaired, it went back to the same technician who did the original work. The technician was not paid while he did the job over again. After the car was properly fixed, the dealership acted to eliminate the flaw in its systems that allowed the mistake to happen in the first place.

A Personal Experience

Sewell's ideas hit home with me because they dovetail perfectly with my own work experiences. Let me tell you about one such situation.

I was the production manager for a mid-sized offset lithographer. One of our customers, a large accounting firm, was producing a book in celebration of its 25th anniversary. It was to be a real showpiece, telling the entire history of the company, and including color reproductions of the portrait paintings of the company's founders. In addition, it was to be hard bound with decorative silver foil stamping on the cloth cover. The completed books were to be handed out at a meeting of hundreds of company partners that was going to occur at a definite time outside the boundaries of the United States.

The man in charge of the project was their public relations manager. He knew a little about printing. To help him get through this major undertaking, he hired, as a temporary worker, a woman who was very intelligent, but who knew absolutely nothing about printing. For purposes of telling the story, let me give them made-up first names. I'll call the man Martin, and his woman assistant, Laura.

At that time, I had never heard the term, "customer service representative." For all I knew, such people did not exist in the printing industry. (Maybe it's true. Maybe there weren't any.) In any event, as the production manager, I was expected to "handle" this customer on this project.

Martin would tell Laura to get something done. Either because he didn't explain it well, or because she knew too little, she couldn't figure out what to do. So she would call me, and say something like this: "Martin just told me to do such and so. What did he mean by that?" Most of the time I was able to figure it out, and help her through that situation. Other times I would have to tell her to go back to Martin and ask these and these questions, and then tell me his answers. This went on for more than two months, on the average of four times a week.

The book came out on time, and was a complete success. The company was so grateful to Laura for her sterling performance that she was converted from temporary to full time, and given responsible positions in the company.

Years later, I left my job with that printing company and went to work for another printer. Two days after I started in the new place. Laura called me. "I have a job here for you to pick up." I explained that I couldn't do that. My previous employer had always been fair to me, and I did not want to hurt him. The answer was, "Don't be silly, Don. Now that you are no longer there we are not going to give them any more work. If you don't take it, it will go to some other printer." I took it, and many another job after that, from her, and everybody else she influenced within her company.

The moral of the story is in Carl Sewell's message. If you want to win customers for life, find out what they want, and give it to them. I found out the things Laura wanted. She made them clear to me. They are part of the list of customer wants that appears below: Understanding of customer needs, responsiveness to those needs, and technical expertise. I gave those things to her, and, in return, won her loyalty for as long as she continued to work.

What Do Customers Want?

If, as Carl Sewell did, you were to assemble a representative group of print customers, and ask them what they want from printers, here are some of the responses you would probably get:

- Good print quality
- Fast turnaround times
- Good customer service
- Low pricing
- Understanding of specific customer needs
- Responsiveness to customer needs
- Technical expertise
- Education to help them understand prepress, presswork, binding and finishing
- Help in solving problems, such as:

  Achieving cost reductions

  Improving job specifications to meet desired results

  Environmentally friendlier products

  Shorter cycle times
- Fast quoting of prices
- Reliability

  Delivery of what is promised
- Availability

  Easy to reach on the phone
- Being kept informed

  "What must I, the customer, do? By when?"

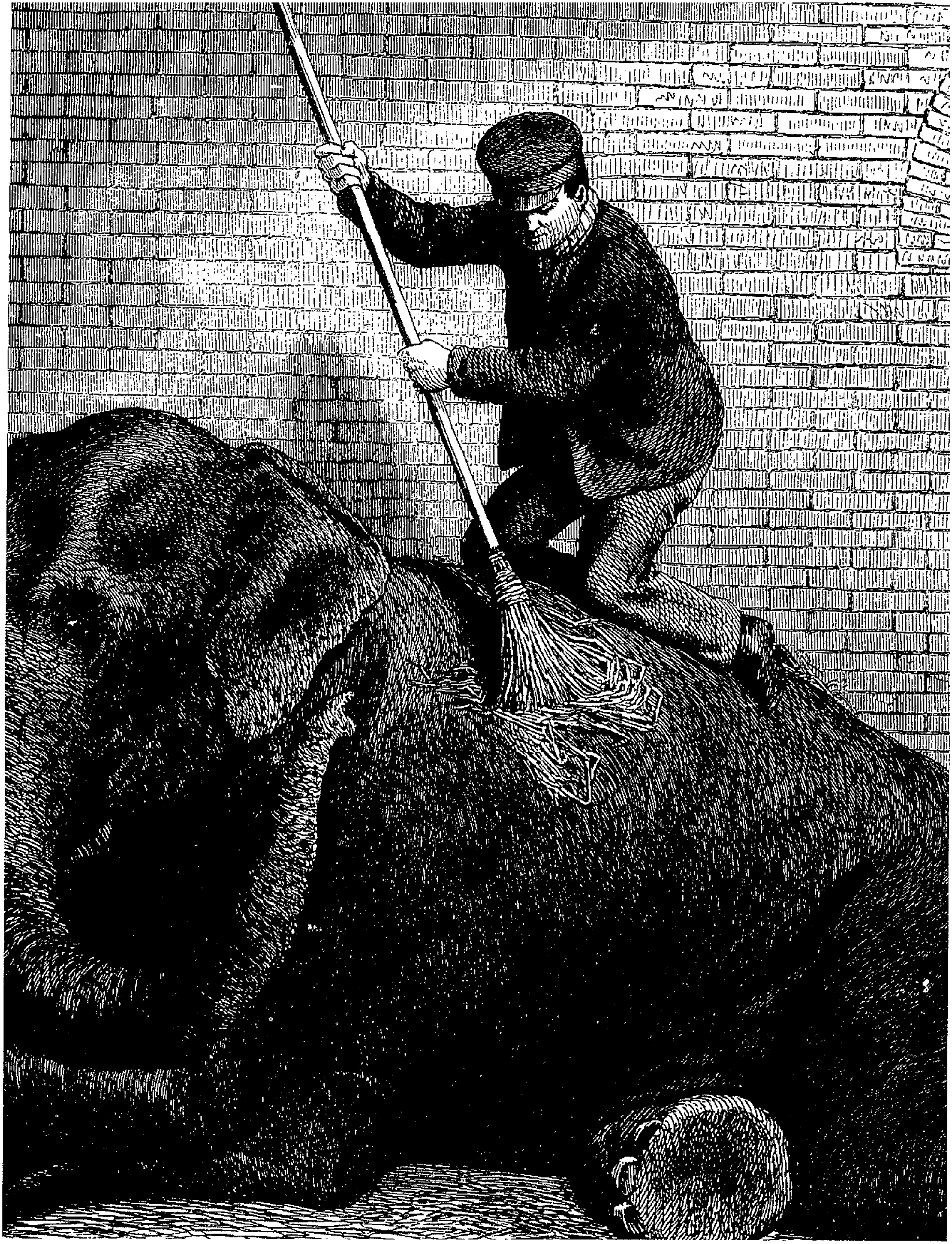
  Is everything going as planned?

  When will I get my proofs?

  When will the job deliver?"
- Courtesy
- Friendliness
- Truthfulness
- Flexibility

  Willingness to bend, easy to work with
- Design
- Accurate proofing
- Good packing and labeling
- On time delivery
- The full amount ordered
- No unwanted overs
- Delivery to the right destinations
- Good messenger and trucking service
- Fair and accurate invoicing

Naturally, not every customer is as concerned about the same things as every other customer. The trick, for printers, is to know what each individual customer wants the most. Then give it to that customer.



CHAPTER
3

A Job Description For Customer Service Representatives

With a good job description, CSRs can understand what their responsibilities are, and, most important, what they are not. (Grooming the company mascot is a "not.")

There is a great deal of confusion about the exact role of customer service representatives (CSRs). In some companies, CSRs are treated as servants of the sales force. After all, aren't they there to make it easier for salespeople to sell? Yes, they are, but that does not translate into picking up dirty laundry.

Some companies expect their CSRs to perform the duties of job planners and/or production coordinators. After all, is it not a good idea to have one person responsible for the entire job, from beginning to end? As a result, CSRs are expected to generate job jackets, plan jobs, do press layouts, order paper, and write purchase orders for outside services.

In small companies it is necessary for people to wear many hats, but, wherever possible, it should be avoided. The same people who are called upon to handle all parts of jobs will inevitably find it difficult to cheerfully accept more and more work from customers and sales reps. When not burdened with so many tasks, CSRs can be much more responsive to what customers need and want.

With a good job description, CSRs can understand what their responsibilities are, and most important, what they are not. Turn the page to see a generic job description, which, with minor revisions, can readily be adopted by specific companies.

A JOB DESCRIPTION FOR A CUSTOMER SERVICE REPRESENTATIVE

Provides in-house support for salespeople whenever a customer requires information or help.

Customers feel more secure when they know there is always a person at the printing plant who is able to help them. Projects can be kept moving along without delay whether or not the sales rep is available.

Assists in communicating between the plant and customers on all jobs in process.

This makes it possible, at all times, to process changed specifications or schedule dates.

Represents the interests of the customer within the company.

Production personnel tend to make decisions based upon what is most efficient for the shop. That trend needs to be balanced out by others who will take the customer's side.

Helps to develop and maintain customer loyalty.

Customers whose needs are met efficiently, consistently, and in a friendly manner find little reason to move their business elsewhere. CSRs should give clients the feeling that not only the sales rep, but everybody in the company, wants to do the best possible job for them.

Answers customer questions in the absence of the salesperson.

Customers have important questions. They need to know, "What will it cost if...? When may I expect my proofs? When will my job be delivered? Will it be feasible to...?" They should not have to wait to ask these questions. Neither should they have to wait very long for the answers.

Helps to obtain complete and accurate job specifications from the customer. Obtains missing information from the customer for estimating and for production.

Estimates cannot be completed when there are missing specifications. Neither can job jackets be properly filled out. When orders are first entered it's okay to have a whole bunch of "Information to Comes." However, CSRs must remain aware of what instructions are missing, and see to it that the blanks are filled in well before production needs the information. One cannot deliver a rush job, on time, to a destination entitled, "To Come."

Transmits proofs to the customer after production department approval, and follows up on their return.

Notice that this job description does not hold CSRs accountable for checking the accuracy of proofs. That is a production responsibility. It is a good idea for CSRs to look at the proofs before they send them out. That makes them more familiar with the projects they are handling. It also helps if CSRs have a duplicate set of proofs on their desks. When that is so, customers can discuss what is on the proofs over the phone.

Keeps accurate records on receipt of customer copy, proofs going out and coming back, and return of copy to customer.

Helps to see that the customer lives up to his or her end of the schedule in submitting art and copy, and in returning proofs.

Many printers hesitate to commit to specific delivery dates. Their reason is that they never know when customers will supply copy or return proofs. But customers must have their jobs delivered by definite times. Therefore, CSRs must keep reminding customers of what they are required to do, and by when.

Keeps informed of status of all jobs at all times so that customer questions can be answered readily.

Customers have questions. They call CSRs and inquire, "When am I getting my proofs?" Very often, the reply is, "I'll check and call you back in ten minutes." Bad response. CSRs should know the answer before the question is asked. In fact, they should not wait for customers to call. They should call first. "Your proofs will get to you at about 10:00 tomorrow morning. Please remember that we need them back before the end of the following day."

Keeps salespeople informed of all happenings that take place between the company and the customer.

CSRs might handle customer requests perfectly. On the next day, customers call the sales reps and ask how "that thing" worked out. Unless the reps were informed by the CSRs, they have no idea what the customers are talking about. The result is confusion and insecurity for both customers and sales reps.

Keeps the scheduler and the production planner informed of what is happening at the customer's end.

Production needs early warning of customer delays so they will have time to fill in the newly created gaps with other useful work. Also, scheduling has to arrange new openings for the postponed work.

Looks at samples of final jobs before they are sent to the customer.

This does not mean that CSRs are the ones who are supposed to pick samples. That is a production function. However, CSRs can act as the final safeguard against customers being falsely led to believe that their jobs turned out worse than they really did.

Handles customer complaints, and strives to have the company do whatever is necessary to satisfy the customer.

Very often, production, or even management, is reluctant to spend time or money to satisfy customer complaints. Yet it costs five times more to attract new customers than to keep old ones. And ninety-five percent of customers whose problems are fixed quickly continue to do business with the offending company.

Calls to the attention of upper management any conditions within the company that lead to customer dissatisfaction or unhappiness.

CSRs talk to customers. They know what irritates customers. A seemingly unimportant issue, such as the way cartons are being labeled, is not unimportant if it bothers customers. CSRs should urge management to fix the problem.

Recommends improvements in company policies and practices that will lead to greater customer satisfaction.

For example, a company might be continually receiving improperly prepared disks from some of its customers. Over and over again, there are hassles, lost time, and unnecessary expenses. CSRs, as well as others, should recommend a well thought out client education program.

Gathers relevant information on customers and maintains Master Customer Information Files.

Certain basic information should be readily accessible at all times. That includes basic job specifications, such as paper preferences and kinds of coatings to use, but much more besides. How can the main contact be reached after business hours? Who do you call if the main contact cannot be reached? Does the buyer have children? What are their names and where do they go to school? What are they studying? When is the buyer's birthday, anniversary, etc.?

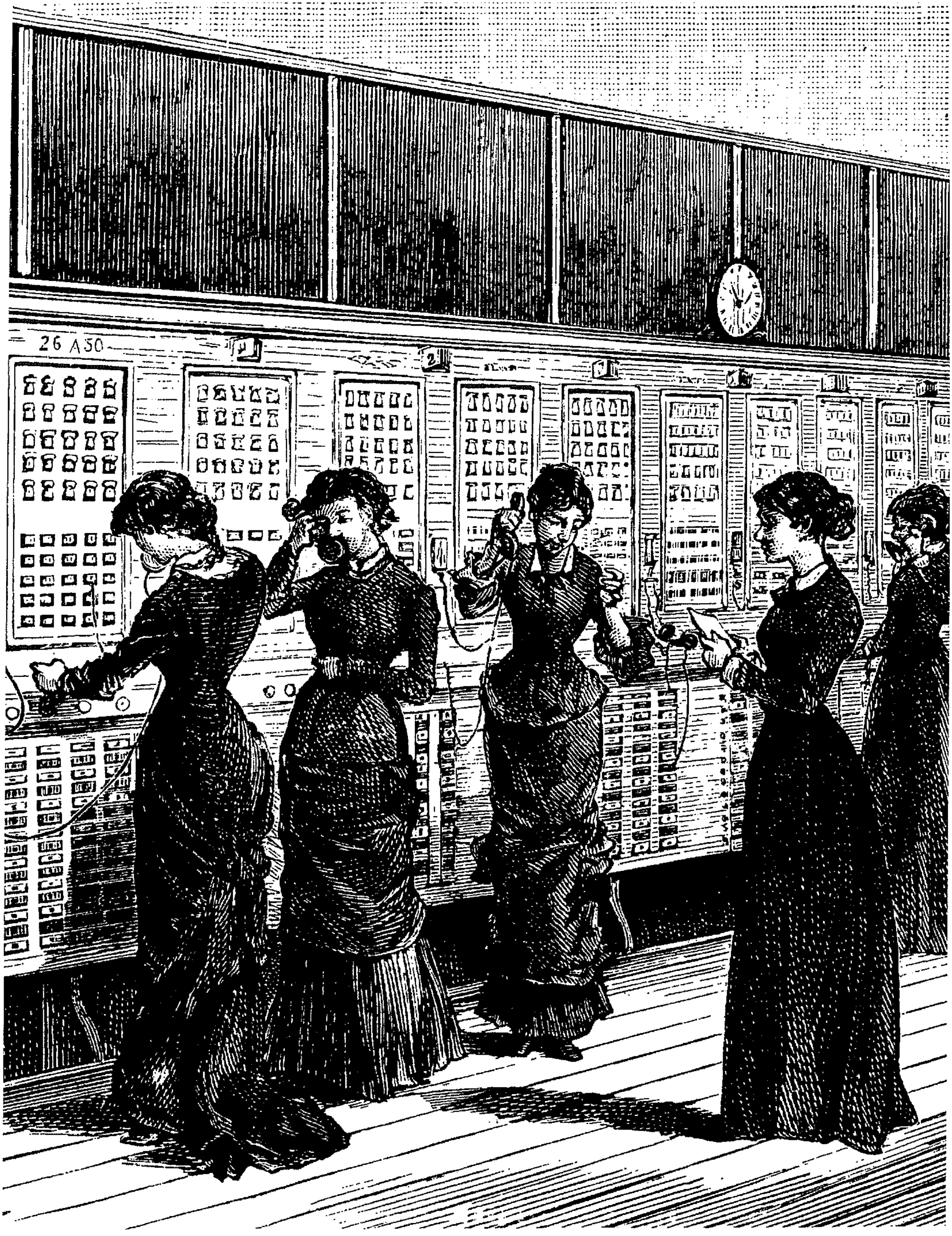
Helps to find opportunities to sell additional services to existing customers.

CSRs develop good working relationships with their main contacts. Eventually, that makes it possible to ask what other people in the customers' companies buy printing, and how can they be approached.

In general, makes more time for sales representatives to sell.

In many printing companies, it is considered to be the best of all possible worlds when sales reps land orders, turn them over (in good shape) to a CSR, and then go out to seek more orders.

Customer Service people should have a strong background in printing and its terminology. They should be good communicators. They should have pleasant personalities.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CHAPTER

4

Telephone Tips

The phone can ring at any time. Be available to answer by the second ring.

Almost the only contact that takes place between clients and customer service representatives (CSRs) is via the telephone. The way CSRs handle themselves on the phone is all important. That is where they can either make a big hit, or miss entirely. Here are some telephone tips which, if followed, can help make CSRs effective telephone communicators:

- Realize that the phone can ring at any time. Be available. Answer by the second ring.

  When customers call to speak to CSRs, they do not want the phone to ring on and on before anybody picks up. Neither do they desire to talk to a machine. Nor do they wish to leave a message asking to be called back. They are calling because they want to speak to a live person, conduct their business, and move on to their next activity.

  That means that CSRs cannot be out in the plant looking for misplaced items, or asking or answering questions, or checking proofs or press sheets, or selecting samples, or making sure that things, in general, are being done properly. They need to remain at their desks where they can pick up their phones, in person, by the second ring. And portable phones are not a good substitute. CSRs must be able to talk to customers from a quiet workplace where all of their working tools and necessary information are available.

- Answer with a smile on your face.

  Seventy-four percent of how customers react to the way they are spoken to on the phone is based upon tone of voice. Smiling faces cause voices to sound much more pleasant. People who don't believe it should try it out. They can record their voices, first with a smile, then without, and listen to the difference.

- Give your name, and ask how you may help the caller.

  It helps when clients know they have reached the right person. It helps even more to know that the person they reached stands ready to help.

- Sound as friendly and pleasant as possible.

Company money that buyers spend does not affect them in a personal way. How they are spoken to does. Even the most cost-conscious, hard-nosed purchasing agents prefer dealing with nice people.

- Do not allow interruptions when you are on the phone with a customer.
- Sound wide awake and completely interested in what is being said.
- Do not try to speak with something in your mouth.

That rules out cheese sandwiches, chewing gum, finger nails, and even pencils.

- Speak slowly and distinctly, but not so slowly that the caller will become impatient.

It is usually best to speak at the rate of speed set by the caller.

- Don't speak too loudly. Don't speak too softly.

Speak just a tiny bit louder than loud enough to be clearly heard.

- Do not use heavy technical language or abbreviations that the caller may not understand.

CSRs cannot recommend using duotones instead of halftones if the people they are talking to do not know what a duotone is. Or a halftone for that matter.

- Always remain courteous, even if the caller is not.

Very often, CSRs need to firmly state the way things are in conversations with customers. But CSRs must understand the huge difference between being firm and being impolite.

- Do not allow yourself to sound as if you are becoming impatient.
- Listen, and keep listening, without interrupting.

It is correct for CSRs to say "uh huh" every once in a while. That lets customers know they are still being listened to.

- Do not jump to conclusions, and guess at what the caller is about to say.

People who think they know what is about to be said cannot listen well enough to what is really said.

- Do not allow yourself to become annoyed at what is being said.

That also prevents proper listening.

- Always have paper and pencil handy. Take notes.
- If the caller is not being clear, ask leading questions. But wait for the right moments. Otherwise, proper queries will seem like interruptions.
- Repeat, in your own words, what the caller has told you.

This helps to prevent misunderstandings. It also gives clients an additional opportunity to make everything entirely clear.

- Tell the caller what action will be taken as a result of the call, and by when it will be done. Make certain that the plan of action is fully understood and considered satisfactory by the customer.

- Allow the caller to be the first one to hang up.

- Avoid putting calls on hold.

- As much as possible, avoid transferring calls.

  If you must transfer a call, let the caller know who you are transferring the call to, and do not try to connect the call until the party you are switching to picks up his or her phone. Let that person know who you are, and who it is you are transferring over.

Major Annoyances

To most people, here are the worst things that can happen when it comes to telephones:

- A phone that rings incessantly without being answered.

- A line that is constantly busy.

- Lengthy periods of listening to music or announcements while waiting to be connected to a live person.

  Each of these three evils should be avoided like the plague

Some Voice Mail Tips

No matter how hard they try, all CSRs cannot answer every phone call by the second ring. Even if they do remain at their desks all of their working hours, it's still not possible. They do eat lunch They do have to go to the bathroom, and they do get busy on the phone with other customers. As much as most of us hate it, in comes voice mail. No matter how well it is used, voice mail starts out with two strikes against it. Remember, the caller wants to talk to a live person, not a machine. So here are some voice mail tips, which, if followed, can help make your voice mail disliked less than most.

- Above all, always answer your phone whenever it is possible. If your callers always get voice mail, they will become convinced either that you are trying to dodge them, or that you are too busy to help them.

- Create a greeting that is warm and friendly.

- State your name, your title, and give a reason(s) why you cannot come to the phone at this time. Keep it brief and to the point. Ideally, you will revise your greeting each day, stating what day it is. In that way, callers will know that the message is not stale, and that you have been to work recently.

- Request key information from callers. That should include their full name, their company's name, their phone number, when they can be reached, and a brief explanation of why they called. That makes it possible for you to prepare what you need for the return call.

- State how often you check your voice mail. It should be at least within every hour and a half.

- If possible, state when you will be available to take calls.

- Do not imprison callers in the voice mail jail. Allow them a way out. For example, you could say, "If you wish to speak to somebody right now, dial 0." In the best of all possible worlds, that other somebody will be a fellow CSR who should be able to do much more than merely take a message. But be careful that the caller does not get sent into another voice mail.
- Check your messages regularly. This should be at least as often as your greeting says you do, within every ninety minutes.
- Return calls promptly. Even if you are not ready with answers, do not leave callers wondering whether you heard their message.
- Call yourself from another extension every so often. In this way, you can find out whether the system is working how you want it to.

CHAPTER
5

Handling Irate Customers

The best way to deal with irate customers is not to give them reason to become irate in the first place.

Customer service representatives (CSRs) live in constant danger of receiving nasty telephone calls from angry customers. Almost always, these calls come at a bad time, and without warning. Nonetheless, CSRs must be able to handle each call calmly and skillfully.

A Late Delivery Problem

For example: A call comes in from a customer who has been doing work with your company for ten years, and is one of its three largest customers. You answer the call. “This is Jane. How may I help you?” The client sounds angry. She says that she called and spoke with someone in your company’s office this morning, and was told that the job that was supposed to be shipped this coming Monday will not ship until Wednesday, two days later, because the finishing department is booked out through this week and most of next week.

She is very upset because her salesperson told her just the day before yesterday that everything was on schedule. She is on the phone now, wanting to know why she was not called and told there was a problem. And what is going to do done about it? She swears that if you don’t make delivery on time, it will be the last order you will ever get from her company.

The CSR didn’t know that the customer spoke to the sales rep, doesn’t know who said the job would be late, and isn’t sure of the actual status of the job. Even though no two printing companies are exactly alike, all CSRs can take certain basic steps that will help them get through this kind of situation.

Basic Steps for Handling Irate Customers

Listen, listen some more, and keep listening.

Interrupting with denials or possible justifications before the customer has had her complete say will only make her even more angry. But it is okay, at appropriate moments, to ask the kind of questions that will help clarify the situation.

Empathize.

Really feel sorry for the customer because she is in such a terrible situation. Once customers know they are talking to empathetic human beings who understand their problems, and really want to help, the way is cleared for rational conversation. At this point, it would be incorrect to apologize on behalf of the company. You still do not know whether your people have done anything wrong. One correct first response could be, "I understand exactly why you are upset. If the same thing happened to me, I would be at least as upset as you are."

Don't take things personally. Remain calm.

One unnerved CSR mixed in with one irate customer can lead only to greater chaos. Remember, the customer is yelling at the CSR, but is really angry at the company as a whole, and at the situation in which she has been placed.

Get the facts from all sides.

If feasible, get off the phone and go on a fact-finding mission. Learn the sales rep's side of the story. Find out who told the customer that the job would be late. Get that person's story. Ascertain the true status of the job. Before excusing yourself, make it perfectly clear that you will do everything possible to solve the problem.

If the facts warrant it, apologize.

One sincere apology placates the customer more than twenty lame excuses. It is best not to put the blame on any one individual. Say that WE made a mistake, and that WE intend to make it right.

Find out exactly what needs to be done to satisfy the customer.

Ask questions such as: "What would you like me to do?", "How would you settle this if you were me?", "What will make you completely happy?"

Let the customer know what you *can* do.

You cannot promise the impossible. Probably, a consultation with others is needed, especially with production management. Find out what they are able to do. Try to make certain that that they are ready to do their best.

Learn whether that will satisfy the customer.

There is no point to having production go to great effort, and even incur expenses, only to learn that what was done still did not satisfy the customer.

If not, find out what will satisfy the customer.

At this point, you may have to go back to production, or upper management to get a solution more favorable to the customer.

Agree upon what will be done.

Naturally, if you cannot reach an agreement, you are nowhere, and will probably have to bow out gracefully, and turn the problem over to somebody else. If there is agreement, restate it, and make sure it is clearly understood. In addition, a confirming letter would be a good idea.

Get the sales representative involved.

This should be done as soon as it is feasible.

Make certain that what was agreed upon really happens.

If, after all of that back and forth, it doesn't happen, you, and your entire company, have blown it. You should keep a close watch over events, and either you, or the sales rep, should call the customer with progress reports.

Check to be sure the customer is completely satisfied.

Ask if there is anything else you can do to help.

Enter the complaint into a Customer Complaint Log.

A well-kept log will show the kinds of mistakes that keep happening over and over again.

Prevent similar mistakes from happening in the future.

The best way to deal with irate customers is not to give them reason to become irate in the first place. Sales, customer service, production, and upper management should work together to figure out ways to correct poor procedures that lead to customer dissatisfaction. Then the new methods need to be implemented, applied consistently, and improved upon as experience suggests.

Handling the Late Delivery Problem

Let's see how you could apply the basic steps for handling irate customers in this situation in which an angry customer is on the phone complaining because she was told that her job would be delivered two days late.

First, you listen, and keep listening without interrupting. Then you empathize, sincerely stating that you understand completely why she is so upset. No matter how rough the language becomes, you do not take it personally. You ask who told her the job would be late. (In this scenario, it turns out that she doesn't know.) You request to be excused for about fifteen minutes so you can get find out exactly how things stand. Before hanging up, you tell her that you will do everything in your power to get her job delivered on time.

As it turns out, nobody seems to know who told the customer that the job would be late. There is no way you can find out. When you speak to production about delivery time, you may learn that the job is really on schedule. In that case, nothing more needs to be changed internally. Or, you may learn that the job is indeed slated to deliver late. In that event, you and production agree that the finishing department will work enough overtime over the weekend to complete as many copies as the customer says she absolutely needs by Monday.

Now it's time to call the customer back. After thanking her for being so patient, probably, the very next thing you should say is that everything is under control. Then, you apologize on behalf of your company. If the job was on schedule right along, you tell her so, and then apologize because somebody misled her, and upset her needlessly.

If the job was going to deliver late, you apologize for that, and also express regrets that she was not informed. You can then tell her that you have arranged for people to work overtime at your company's expense, and would like to know how many copies she absolutely needs on Monday, and when will she need the balance. You get the answer, assure the client that it will be done, and convey the information to production.

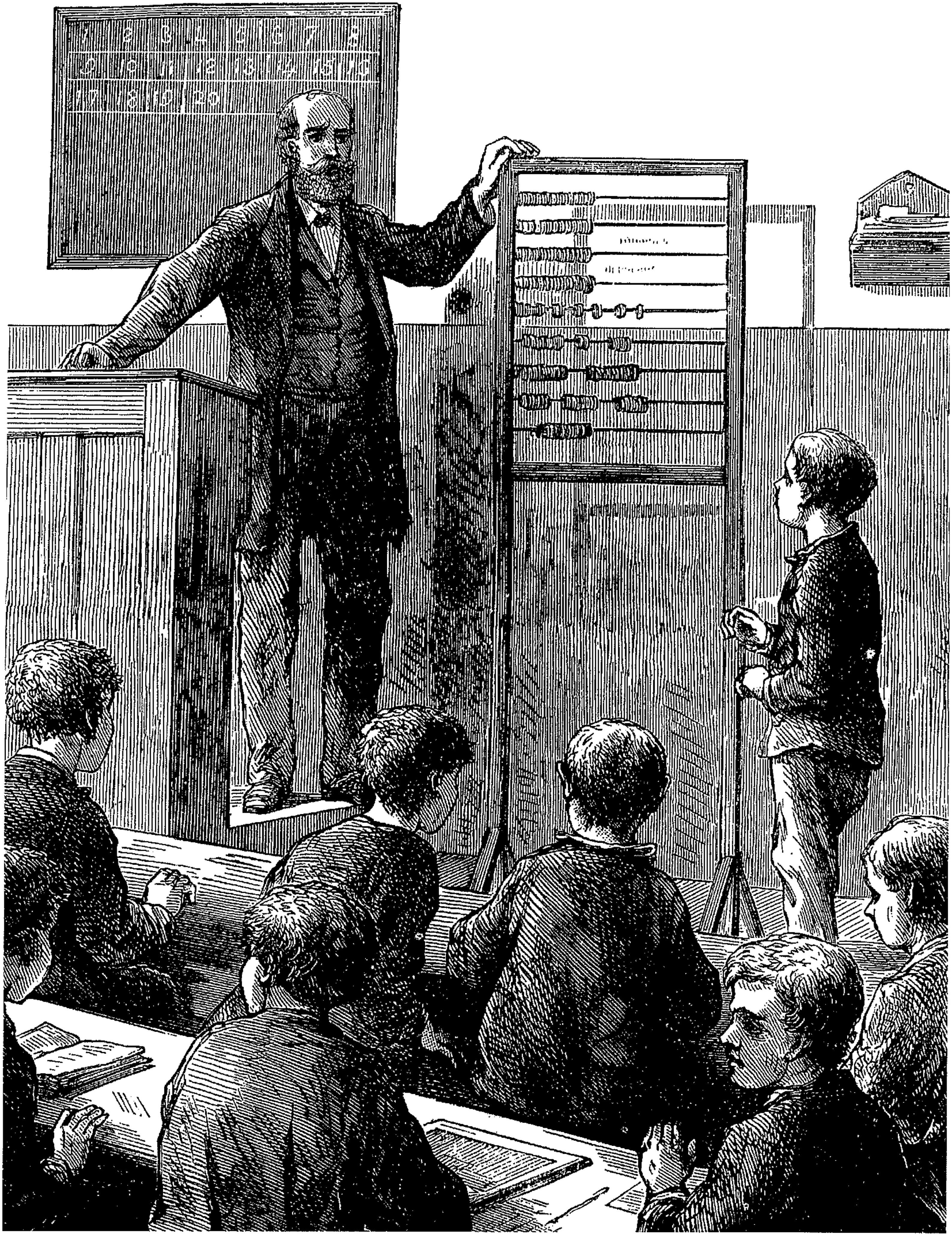
As soon as possible, you let the sales rep know what has happened. You make certain that the work is really done, and either you or the sales rep keep the customer informed. You record what happened in the Customer Complaint Log, and one of you checks to be sure the customer is completely satisfied.

Soon after that, it becomes time to work on preventing the same kind of mistake from happening again. Here are some possible changes in procedure:

All calls from customers should be routed either to that customer's sales representative or to that customer's customer service representative. If the CSR is not available at that moment, the call should go to another CSR.

There should be written job schedules. Each CSR should receive a copy of the same schedule the plant is working from. If work that needs to be done does not show up on the schedule, the CSR whose customer is affected raises the alarm immediately upon receiving the schedule. In the above example, had the job been on schedule, the CSR would have known that, and been able to tell it to the customer in the first phone conversation. If the job was not on schedule, the CSR would have known that, and would have initiated appropriate action without allowing the customer to be caught off guard.

In this scenario, the company's policy on overtime is commendable. CSRs, together with production, are allowed to arrange for overtime without having to consult upper management. The CSRs and production understand company policy, and management has faith in their ability to exercise good judgment. The company sets policy based on its knowledge that when bad things happen, the way to maintain customer faith is to make amends, without delay, and to the client's complete satisfaction. Not only is customer faith maintained in this way, it is deepened. The satisfied customer will probably tell at least five other people about the wonderful thing the company did.


1 2 3 4 5 6 7 8
9 10 11 12 13 14 15 16
17 18 19 20

CHAPTER

6

Teaching Print Buyers How to Buy Printing

Printing is not like buying sardines off a shelf.

Customer Service Representatives (CSRs) cannot live according to the rule that customers are always right. That principle does not apply when it comes to print purchasing. Printing is not like buying sardines off a shelf, where all you have to know is the name of the brand you like. Customers must play a major role during the many stages of major printing projects, and far too many of them do not know enough to play their part well. Sales representatives and CSRs should teach customers what they need to know, and then urge them to use that knowledge to best advantage.

At Estimating Time

The need for customers to have knowledge begins right at the beginning, when they request prices. Many print buyers are required to get bids from at least three sources. Then they feel compelled to select the lowest bidder. That practice can lead to disaster when the low bidder does not have the ability to produce the job in a satisfactory manner. Sales reps and CSRs should teach buyers to solicit bids only from printers who can do their work at the proper level of quality.

Print buyers should be taught to give exactly the same job specifications to all bidders. That is the only way to compare apples with apples, and not apples with tangerines. Specs given verbally over the phone cannot be uniform. When a question is asked by one printer, the answer can make the facts seem different to that printer. Specs, in order to be the same for all bidders, must be in writing.

A printing company may come up with a creative idea which makes it possible to do the same job for less money, or a better job for the same money. In that event, the buyer should convey that idea to the other bidders, so they can do their estimates based upon the same specs. There is no other way to compare apples with apples. Naturally, buyers have the option to favor the creative bidder, but should do so knowing whether they are spending more money, and, if so, how much more.

Customers should learn not to select printers based on price alone. There are just too many other considerations that one cannot afford to ignore. Which printers deliver the proofs and the final job when promised? Who achieves the highest level of quality? Who can produce the job the fastest? Who makes the most useful creative suggestions? Who offers the best technical advice? Which printers give warning when additional charges are about to be incurred? Who carefully checks incoming disks before putting them into production to be sure they are suitable for the printing process to be used? Which printers systematically check all proofs before sending them out to customers? And which printing firms have a staff of competent customer service representatives always available to give help when needed?

At Purchase Order Time

Buyers should be taught to write accurate and complete purchase orders that contain all the information needed to produce jobs properly. At press time, it is not enough to know that the sheets print in two colors. The press operator needs to know precisely what two colors. Neither does it help to learn, after the job has been bulk packed in convenient cartons, that it was intended to shrink wrap in 20s.

Giving complete information includes telling printers the end use of jobs. Unless printers are informed that the labels will be used in the outdoors, they cannot know it is necessary to protect them from the weather. Without being told that posters will be exposed to sunlight, printers cannot know to use fade resistant ink. Neither can printers see the need to use heat resistant inks unless they are told that the letterheads will be subjected to the hotness of photocopiers.

The same need for information applies to both black and white, and color photographs. No matter how hard desktop designers and printers try, the final printed picture cannot be an exact match to the original. That is a limitation of the process. Therefore, printers cannot simply be instructed to match copy. They need to be told the aim point of each illustration. If it is a picture of a man, a woman, a boy, and a girl having a picnic on a lawn, why is that picture being used? Is the aim to sell grass seed? Or maybe, it's meant to promote a brand of clothing. It could also be the tablecloth, or the crystal, or the chinaware. But then again, the aim may be to demonstrate that families that picnic together stay together. Printers, who are made aware, can manipulate the inevitable distortions in such a way as to help protect the aim points.

At Scheduling Time

Too many print buyers fail to take the trouble to learn when the printed piece is needed. They take the lazy person's way out, use urgent, but vague language on purchase orders, and hope for the best. But "Rush" is not a delivery date. Neither is Super Rush" nor "ASAP." The only thing that has meaning to printers is a specific date and time, such as: "The entire shipment must arrive at our warehouse by 2:00 P.M. on July 22." Sales reps and CSRs should strive to convince their customers to supply concrete delivery times based upon when the product is really needed.

Once delivery times are established, printers can issue schedules with the target dates for the major activities needed to produce jobs. These dates would include times for sending copy to printers, and for okaying final proofs.

It then becomes the task of CSRs to help make sure that customers live up to their ends of the schedules. Also, CSRs ought to make clear that it does little good to return proofs on time if the proofs are so loaded with author's alterations that extensive corrections are required, plus a new round of proofs.

At Disk Preparation Time

Many people who work on files that will be used to output film or plates for printing need to be taught more about how to prepare the files. Far too often, disks come to printers containing errors which lead to mistakes in the work, delays in getting the job done, and needless additional expense.

Listed below are some errors that occur over and over again. With proper communication between printers and the people who prepare files, each one of these errors can be prevented.

- The file is not proofread.

  Spell Check has severe limitations. It accepts letter combinations that happen to combine to make words, even though they might be the wrong words. The desired message could be, "You shouldn't commit murder." Spell Check would not care if you leave out the "n't", and thus change it to, "You should commit murder."

- No proofs of the file are made and sent to the printer.

  The proofs should be in the same focus as the intended final job. When it is done that way, printers can lay the output film directly over the proof, and easily detect errors. Naturally, the proofs should be thoroughly checked before they go to printers. Proofs and proof checking are even more necessary when printers bypass film and go directly from computer to plate (CTP).

  The proofs should be marked identifying traps, bleeds, and color breaks.

- Proofs are sent, but they are not proofs of the final version.

  Files are prepared in customer companies. Proofs are made. Changes are made to the files, but no new proofs are made.

- Fonts are missing, and nobody checks to see if the printer has the desired fonts, and in the right versions.

  If a different font or version is substituted, the type will almost certainly rewrap, and possibly not fit the space properly.

- Picture files are missing.

  The low resolution For Position Only (FPO) file is there, but it was linked to a high resolution file that got left behind.

- Crop marks are missing.

- Original application files are not sent.

  Encapsulated Postscript (EPS) files cannot be easily modified, and there is a severe limit to the amount of editing that can be done on Portable Document Format (PDF) files.

- Images are imported into page makeup files without first being cropped.

  As a result, the files are much larger than necessary, and take more time to go through Rapid Image Processors (RIPs).

- Customers fail to keep backups of everything they send.

- Customers fail to send work orders containing the information needed by printers.

  Printers can help themselves by preparing blank order forms that ask for the bare bones information needed to process customer files. Listed below are some of the questions that should be on the forms. They go beyond the usual information required on purchase orders, such as quantity, size, number of pages, kind of paper, colors of ink, coatings, and binding style.

- What hardware was used?
- What software was used? What version?
- In what format was the file saved?
- What type fonts were used?

  Include the manufacturers' names and the versions.
- List the linked graphic files.
- Is trapping required? Where?
- What kinds of proofs do you require?

  How many sets of each?

At Proof Checking Time

Proofs are made and sent out to customers. Printers expect their customers to check them carefully, and send them back with either an "Okay to print as is", or an "Okay to print with corrections as marked on the proofs", or "Make the corrections marked on the proofs, and send new proofs." But there's a big hitch. Many customers do not do a good enough job checking proofs. It's either because they feel anything that's bad can be fixed when they go on press okays, or they just don't know how to go about checking proofs. CSRs should supply customers with a set of guidelines for evaluating proofs. It could list the following checkpoints:

- Does the proof accurately show what the job will look like on press?
- Are there are any typographical errors?
- Is the trim size correct?
- Are all of the pages there, and in the correct sequence?
- Are all the elements in the correct position?
- Do borders and rules that cross over into another area align properly?
- Do the images that are supposed to bleed have at least 1/8-inch extra image at the bleed edges?
- Do the traps have the right amount of overlap, and are they not too conspicuous?
- Have any image areas been masked over or trimmed off?
- Are all the photographs in the correct place, properly scaled and cropped, and not flopped?
- Are all of the elements in register?
- Is each element in the right color?
- Are the color illustrations vivid and rich?
- Have the aim points of the illustrations been protected?
- Have areas of critical color been accurately matched?
- Are there any blemishes, spots, or broken letters?
- Is the folding correct?
- Have all of corrections from the previous proof been made, and made correctly?
- Have any new errors crept in since the last proof was pulled?

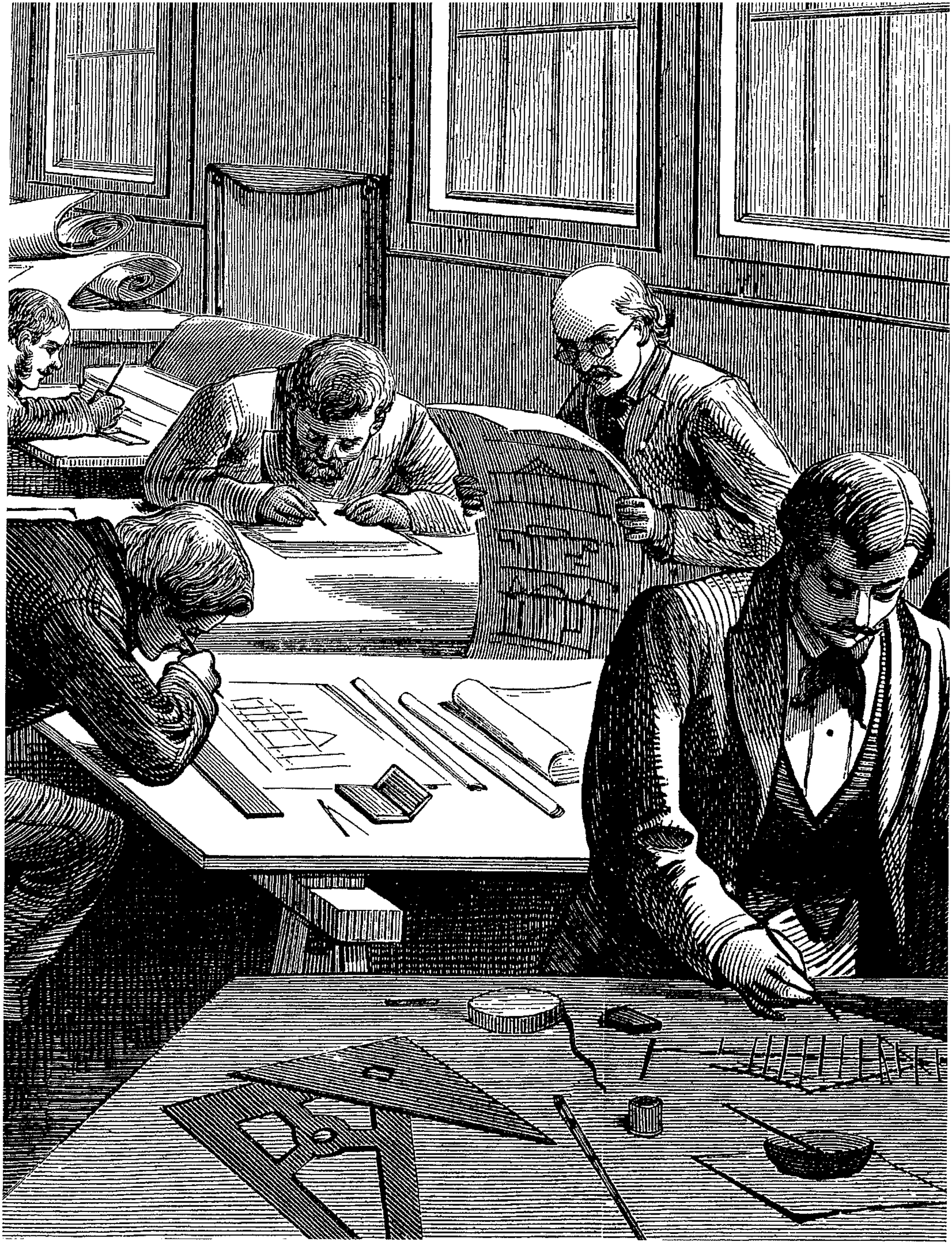
At Press Check Time

Very often, especially with important projects, customers go to printing plants in order to do the final press okay before their jobs are allowed to start printing. They care a lot, and they feel, rightfully so, that this is a key moment to make certain that the final product will be totally satisfactory. Unfortunately, many customers do not know enough about how to do a press check. As a result, they often cause extra paper to be wasted, and bring about needless delays, all without making any contribution to the look of the job. To help improve upon this situation, here are some tips that CSRs could pass along to their customers.

- Don't you be the one to come to the printer to do a press check unless you have the authority to give a final okay.
- Before you get to the press checking stage, be certain you are totally satisfied with the final proofs. There is a severe limit to how much can be changed at press.
- Be aware that the press sheet cannot possibly be an exact match to either the original copy or the final proof.
- Have with you, at the press, all original copy, ink and paper swatches, and the final okayed proofs.
- Do not start out by focusing on small details such as broken type.
- Slowly scan the entire sheet in order to get an accurate general impression.
- Be sure that the paper is the same brand, color, finish, and weight that you specified.
- Be sure that the ink colors are what you specified, and that they reasonably match the swatches you supplied.
- Be sure all of the copy is correctly positioned on the sheet.
- Be sure that everything is in register.
- Study the color pictures, the black and white pictures, and the type to be sure the ink colors are in balance, and of the right density.
- Look for flaws such as broken type, pinholes, mottling, hickeys, and ghosts.
- Proofread the big type one last time.
- Have the sheet folded and trimmed to be sure everything lines up properly.
- Do not insist that every unimportant thing be fixed. If the end product isn't really being hurt, it's often best to leave well enough alone.
- Sign your name to a sheet that satisfies you. This then becomes the standard for the balance of the run.
- Be aware that in offset lithography, it is impossible to hold color exactly the same throughout the entire run.
- Be aware of dry-back. The ink is neither as dense nor as brilliant after it dries. Perhaps you should remain at press long enough to see a dry sheet.

At All Times

Print buyers should be open to constructive criticisms. When printers call to explain that there will be a problem producing a job properly for one reason or another, there is nothing more discouraging to the printers than to be told to "do the best you can." Most printers strive for excellent results, but this response is almost the same as telling them to work with one hand tied behind their backs. It makes it impossible to do a decent job.



CHAPTER 7

Getting Complete And Accurate Specifications

There has to be a procedure to ensure that job jackets are completely filled out on time.

Job specifications come to customer service representatives (CSRs) from all different directions. They can come directly from customers, either written or verbal. They can be turned over by salespeople, in writing, or, as is often the case, verbally. In any event, many times, specifications are missing. Even worse, the ones that are there are not always accurate.

Having received the specs, CSRs are expected to put them in apple pie order, and pass them on to a job planner/production coordinator who uses the information to generate a job jacket. In many cases, when specs are not provided, CSRs do note their absence, and fill in the blanks with something like, "To Come." Then job planners follow suit, and do exactly the same thing. Thus, job jackets go out into printing plants sprinkled with a bunch of "To Comes." That's not so terrible. It does get jobs quickly started in production. After all, you don't need to know how the final product will pack before you begin processing disks or outputting film.

But it can be a terrible practice. When CSRs don't go after the missing specs right from the beginning, what guarantees are there that the instructions will be there by the time they are needed in the plant? What if proofs have been okayed, plates are made, and paper has been loaded into the press, but the job jacket still says, "Printed 2 colors, specific colors to come?" Clearly, there has to be a procedure which ensures that job jackets are completely filled out on time. This can only happen if CSRs begin asking their questions right away. If answers cannot be obtained before the job jacket gets written, the CSRs need to keep a running tally of the missing information. Then, as a steady practice, they must politely, but firmly, pester sales reps and customers for the missing specs.

Getting job specifications, and getting them right, is a tricky process. Skillful handling is required. Without it, printers can produce jobs exactly to customer specs only to have them end up as totally worthless. CSRs need to find out more than just the obvious. More obscure questions, such as these. need to be asked:

- Who is the end user (the printer's customer's customer)?
- How will that person use the product, and for what purpose?
- What will make the end user totally happy?
- What is the precise quantity needed?
- Show us exactly how you want the ink to look.
- Show us exactly how you want the printed piece to fold.

Effect of Not Knowing End Use

A publisher specifies a hard bound book, Smyth sewed. At the printer's end, nobody asks what the book is about, or how it is going to be used. The printer submits a bid, wins the order, and produces the job following customer specs. The book goes out into the marketplace. The buyers of the book are unhappy. It's a cook book, and every time somebody tries to work with a recipe, the book slams shut. The binding style failed to match up with the end use. The printer should have recommended one or another kind of lay flat binding, and the publisher should have accepted the suggestion.

Effect of Not Knowing Enough About Quantity Needed

Twenty thousand copies are ordered. The job jacket is written calling for the production of 20,000 copies. With nothing more said about quantity, printer's trade custom number 12, entitled, "Over-runs and Under-runs", comes into play. It states,

> "Over-runs or under-runs will not exceed 10 percent of the quantity ordered. The provider will bill for actual quantity delivered within this tolerance. If the customer requires a guaranteed quantity, the percentage of tolerance must be stated at the time of quotation."

That's the same as saying that when a customer orders 20,000 copies, it's okay to deliver 18,000 so long as you bill for 18,000. But suppose the customer publishes a magazine with 19,925 subscribers. Will 1,925 readers be glad to do without one of the issues they paid for? Or, it can go the other way. Instead of 20,000 copies, the printer produces 21,925 copies, and bills accordingly. But the customer has absolutely no use for extra copies, and does not want to pay for them.

Effect of Inadequate Ink Specifications

The buyer specifies that the job is to print in black plus a Pantone color, and names the particular number. The job jacket is written that way. The job is printed and delivered. The color does not match the swatch from which the Pantone number was copied. The customer is unhappy. Why cannot that printer perform a simple color match?

Pantone Matching System books are in two parts. The swatches in the first half are printed on coated paper, and in the second half, they are on uncoated. The same color inks on the two different surfaces do not look alike. If the color was selected based upon how it looked on coated paper, and then the job was printed on uncoated, that could explain the customer's unhappiness. Moreover, PMS books are printed by printers, and printers cannot hold color with perfect consistency throughout the run. That is a limitation of the process. In addition, the colors in PMS books fade with time. For these reasons, no two books can be exactly alike. Therefore, specifying a number, by itself, is not enough. A swatch, picked by the color selector, must be sent to the printer. The press operator is told the PMS number, given the swatch, and instructed to make the color of the job look like the color of the swatch.

Effect of Incomplete Folding Instructions

A flyer is printed black ink two sides. The trim size is 8-1/2 x 12 inches. The instruction is to fold it two folds to fit a number 10 envelope. But this can be done six different ways. It can be what some people call a roll fold, and others call a barrel fold, with the top of page 1 out, or the bottom of page 1 out, or the top of page 2 out, or the bottom of page 2 out. Then again, it could be what some people call an accordion fold, and others call a Z fold. That could be with either the top of page 1 out or the top of page 2 out.

What is required, in addition to the written specification, is a folding dummy. Moreover, the dummy should be marked in such a way that it can be detected if someone looking at it opened it out and then closed it back the wrong way.

Getting absolutely complete and fully accurate specifications for estimating and for production is a vital contribution customer service representatives can make for their companies. (Please see the model *Request for Estimate/Order Entry Form* starting on the next page. With company specific modifications, it can be adopted by most printing firms, and used as a working tool to help pin down job specs.)

☐ THIS IS A REQUEST FOR
ESTIMATE
DATE: ____________

YOUR COMPANY NAME

☐THIS IS A REQUEST FOR
ORDER ENTRY
DATE: ____________

REQUEST FOR ESTIMATE OR ORDER ENTRY FORM

CUSTOMER INFORMATION	CUSTOMER NO:
NAME:	
ADDRESS:	
PHONE:	
FAX:	
E-MAIL:	

CONTACT:

SALES REP: ____________

ESTIMATOR: ____________

DATE ESTIMATE NEEDED	QUOTE NUMBER

PREVIOUS ESTIMATE NO. ____________ PREVIOUS JOB NO. ____________

☐ EXACT REPRINT ☐ REPRINT WITH CHANGES ☐ NEW JOB

JOB TITLE:							
DESCRIPTION							
END USE OF FINISHED JOB							
QUANTITIES						ACCEPTABLE OVERS	UNDERS

COPY IN BY:	PROOFS WANTED BY:	JOB WANTED BY:

☐ PARTIAL DELIVERIES ACCEPTABLE	QUANTITY	DATE WANTED BY	QUANTITY	DATE WANTED BY	QUANTITY	DATE WANTED BY

NUMBER OF PAGES OR PANELS	SIZE FLAT	SIZE FOLDED	☐ BLEEDS WHICH EDGES: ____________
	X	X	
GRAIN DIRECTION	☐ PLUS COVER ☐ NO COVER	COVER SIZE FLAT	☐ BLEEDS WHICH EDGES: ____________
		X	BINDING EDGE: ____________

__NUMBER OF PICKUPS FROM PREVIOUS JOBS CUSTOMER WILL PROVIDE __ MECHANICAL ART __ DISKS/MEDIA __ SLIDES/ART FOR HALFTONES

MEDIA SUPPLIED: ___ FLOPPY DISKS ___ REMOVABLE HARD DISK CARTRIDGE ___OPTICAL DISK ___ MAGNETIC TAPE ___ CASSETTE TAPE
___ DAT TAPE ___ CD-ROM ___MODEM TRANSMISSION ___E-MAIL TRANSMISSION ___FTP TRANSFER ___ OTHER:____________

FILES ARE COMPRESSED USING: ____________

FILES WERE CREATED USING:				
☐ QUARK	Version	☐ Mac	☐ IBM	☐ UNIX
☐ PAGEMAKER	Version	☐ Mac	☐ IBM	☐ UNIX
☐ ILLUSTRATOR	Version	☐ Mac	☐ IBM	☐ UNIX
☐ FREEHAND	Version	☐ Mac	☐ IBM	☐ UNIX
☐ PHOTOSHOP	Version	☐ Mac	☐ IBM	☐ UNIX
☐ VENTURA	Version	☐ Mac	☐ IBM	☐ UNIX
☐ COREL DRAW	Version	☐ Mac	☐ IBM	☐ UNIX
☐ OTHER:	Version	☐ Mac	☐ IBM	☐ UNIX

NAMES OF FONTS AND VERSIONS USED:

____

____

____

____

____

____

IF SUPPLIED BY PRINTER	5 x 7	6 x 9	7 x 10	9 x 12	12 x 18	18 x 24
QUANTITY OF:						
LINE SHOTS						
REVERSES						
TRAPS						
SQUARE HALFTONES						
SILHOUETTE HALFTONES						
SQUARE DUOTONES						
SILHOUETTE DUOTONES						
SQUARE SEPS FROM TRANSPARENCIES						
SILHOUETTE SEPS FROM TRANSPARENCIES						
SQUARE SEPS FROM REFLECTIVE ART						
SILHOUETTE SEPS FROM REFLECTIVE ART						
ONE-COLOR TINTS						
TWO-COLOR TINTS						
THREE-COLOR TINTS						
FOUR-COLOR TINTS						

___ ASSEMBLY REQUIRED ___ EDITING REQUIRED ___ SUPPLY LOW-RES SCANS FOR PLACEMENT

TRAPPING

___ SUPPLIED BY CUSTOMER

___ SUPPLIED BY PRINTER NUMBER OF TRAPS: __________ ___ TRAP FOR METALLIC INKS

NUMBER OF BLENDS (GRADUATED SCREENS): __________

COLORS: ___ BLACK ONLY ___ TWO COLOR ☐ BLACK PLUS ONE STOCK FLAT COLOR ☐ BLACK PLUS ONE PANTONE COLOR

___ CUSTOM TWO-COLOR DESCRIBE: ____

___ PROCESS COLOR ___ PROCESS COLOR PLUS ___ ADDITIONAL PANTONE COLORS ___ HI-FI COLOR

NUMBER OF PROOFS REQUIRED:

___ LASER PROOFS ___ DYE TRANSFER ___ INK JET ___ DIGITAL HALFTONE __BLUELINES ___ COLOR KEYS

___ MATCHPRINTS (___ LOOSE ___OVERALL)

___ CROMALINS (___LOOSE ___OVERALL)

___ PRESS PROOFS (___LOOSE ___OVERALL)

___ OTHER: ____

IMAGESETTER OUTPUT: ______ dpi

SPECIAL INSTRUCTIONS:

____

____

____

PRESS

	INK COLORS (SUPPLY SWATCHES)	% OF COVERAGE
TEXT SIDE 1		
TEXT SIDE 2		
COVER SIDE 1		
COVER SIDE 2		
INSERT SIDE 1		
INSERT SIDE 2		

☐ VARNISH ☐ AQUEOUS COATING ☐ UV COATING

☐ SPOT ☐ OVERALL

☐ DULL ☐ MATTE ☐ GLOSS PRESS OKAYS BY:

SPECIAL INSTRUCTIONS: ____

____

____

PAPER

SUPPLIED BY: ☐ CUSTOMER ☐ PRINTER

DESCRIPTION	NO. OF SHEETS	BASIS WEIGHT	BRAND NAME	FINISH	COLOR
PROOF PAPER					
TEXT PAPER					
COVER PAPER					
INSERT PAPER					
OTHER:					

BIND AND FINISH

☐ TRIM TO SIZE ONLY

☐ FOLD ONLY
NO. OF PARALLEL FOLDS: ______ NO. OF RIGHT ANGLE FOLDS: _____ ☐ ROLL FOLD ☐ ACCORDION FOLD
NO. OF PERFS: _____ NO. OF SCORES: _____ ☐ BOOK TRIM AFTER FOLD

☐ PERFECT BIND ☐ NOTCH ☐ GRIND OFF ☐ "LAY FLAT" BINDING ☐ END LEAVES ☐ GLUED AT SPINE ☐ FULL PASTED
☐ HINGE COVER ☐ COVER FLUSH ☐ COVER OVERHANG

☐ PASTE ON FOLD

☐ SADDLE STITCH ☐ 2 STITCHES ☐ 3 STITCHES ☐ SOFT FOLD ☐ HARD FOLD

☐ COLLATE & SIDE STITCH ☐ 2 STITCHES ☐ 3 STITCHES ☐ COLLATE & CORNER STITCH ☐ COLLATE ONLY ☐ SLIP SHEET

___ MECHANICAL BIND: ☐ PLASTIC COMB ☐ WIRE-O ☐ SPIRAL ☐ TAPE BIND ☐ VELO BIND ☐ OTHER: ____________

DESCRIBE: ____________

___ HOLE PUNCH: ☐ 1 HOLE ☐ 2 HOLE ☐ 3 HOLE ☐ 5 HOLE ☐ 1/4-INCH ☐ 5/16-INCH INCHES C TO C: ____________

___ROUND CORNER: ☐ 2 CORNERS ☐ 4 CORNERS

___PAD: SHEETS PER PAD: ________ NO. OF PADS: ________ ☐ GLUE AT TOP ☐ GLUE LEFT ☐ GLUE RIGHT ☐ GLUE BOTTOM ☐ WITH CHIPBOARD

☐ MOUNT ☐ DIE CUT ☐ PASTE ☐ SCORE ☐ PERFORATE ☐ TAB

☐ NUMBER NO. OF PLACES: ______ COLOR: ____________ ☐ FORWARD ☐ BACKWARD FROM: __________ TO: __________

☐ LIQUID LAMINATE ☐ 1 SIDE ☐ 2 SIDES ☐ OVERALL ☐ SPOT ☐ FILM LAMINATE ☐ 1 SIDE ☐ 2 SIDES

☐ EMBOSS ☐ FOIL STAMP NO. OF COLORS: ______ IMAGE AREA: ____________

☐ OTHER

SPECIAL INSTRUCTIONS:

____

____

____

PACKING

☐ SHRINK WRAP IN UNITS OF: ________
☐ PAPER BAND IN UNITS OF: ________
☐ STRING TIE IN UNITS OF: ________
☐ PACK IN CARTONS IN UNITS OF: ________
☐ PACK BULK IN CARTONS MAXIMUM WEIGHT OF CARTON: ____________
☐ PACK CARTONS ONTO SKIDS
☐ PACK BULK ON SKIDS MAXIMUM WEIGHT OF SKID: ____________

☐ KRAFT WRAP IN UNITS OF: ________
☐ RUBBER BAND IN UNITS OF: ________
☐ PACK IN LETTERHEAD BOXES

☐ MAIL DESCRIBE: ____________

____

____

SPECIAL INSTRUCTIONS: ____________

____

SHIPPING

☐ F.O.B. OUR PLANT ☐ INCLUDE SHIPPING COSTS

	QUANTITY	DESTINATION	CARRIER
1.			
2.			
3.			
4.			
5.			

CHAPTER 8

Relations Between Sales And Customer Service

CSRs should stand ten feet tall, and think of themselves as professionals.

Most customer service representatives (CSRs) have grievances against salespeople. Here are some of their more frequent complaints.

Complaints Against Salespeople

- Salespeople provide incomplete job specifications.
- They provide complete specifications, but make sure they aren't accurate.
- They give specifications verbally.
- They give specifications verbally, and then deny they ever said it.
- They make it a virtue to know as little as possible about printing.
- They say "yes" to whatever customers want, whether it is possible or not.
- They say that customers want jobs delivered sooner than their customers say they are needed.
- They agree to deliver jobs by a certain time without first checking with customer service or production.
- They agree to deliver jobs by a certain time and then fail even to tell customer service or production.
- They always request that other sales reps' jobs be pushed back, but never agree that one of theirs be moved.
- They give instructions directly to people in the plant.
- They give instructions directly to people in the plant, and then fail to tell customer service or production.
- They agree to tell customers the bad news, but then fail to do so.

- They hide whenever there is trouble on one of their jobs.
- They always side with the customer.
- They act nervous all of the time.
- They threaten to go to the boss whenever they are not getting everything exactly their way.
- They really go to the boss.
- And, worst of all, they bully CSRs.

Here is how one typical complaint is expressed: "All salespeople think they are the only ones we have to work with. They expect us always to drop what we are doing, just to wait on them. They treat us like servants."

Why Salespeople Are The Way They Are

It is bad enough that CSRs feel this way. Worse yet, in many cases, the complaints are completely valid. More than anybody else in the printing industry, salespeople get away with murder. As a group, they are difficult to control. If they were the type to be happy as meek, easy to manage, nine to fivers, they would never have gone into sales in the first place.

Owners rely upon sales reps to bring in business. They dread the possibility that salespeople might leave the company and take their customers with them. Regardless of how they feel personally, owners end up judging sales reps by only one standard: How much profitable business are they bringing in?

The problem is made worse because most sales reps are paid on a commission basis. If not, their income is still related, in some way, to how much they sell, and not to the overall profitability of the company. Under these conditions, it should surprise no one when sales reps act selfishly. Who would not prefer to sell a $10,000 job for $9,500 and make a commission, rather than try to sell it for $10,000, and possibly get no commission at all?

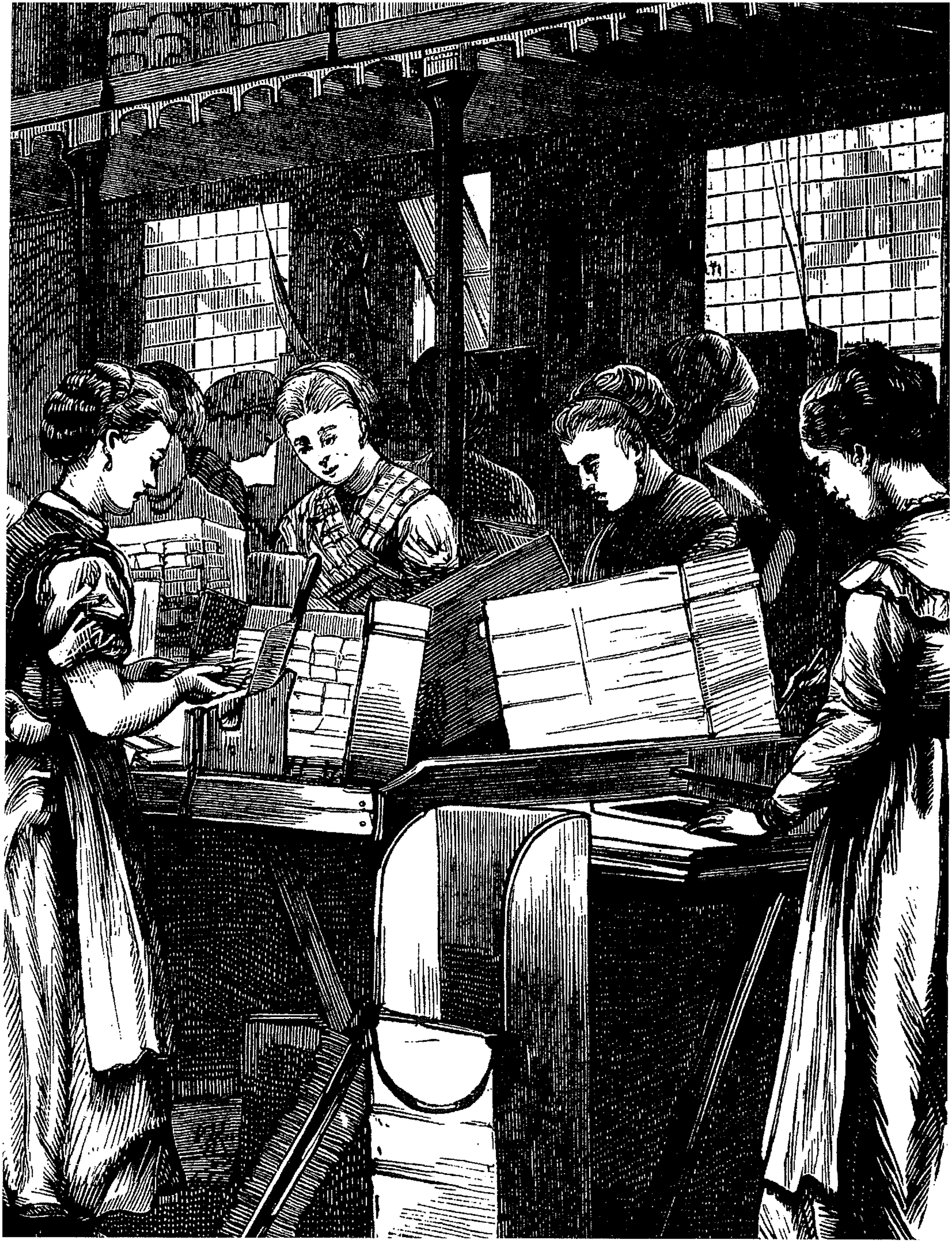
Where does this leave CSRs and their complaints? Just about nowhere. Until owners overcome their fear of salespeople, not much will change. Until salespeople are no longer compensated in ways that encourage them to feel like individual entrepreneurs, not much will change. But one thing can change right away: that is the way CSRs think about themselves. No matter what anybody else believes, CSRs are not there to serve salespeople. CSRs exist to serve customers. They make an invaluable contribution to their companies. Does not competent service, easily obtained and cheerfully given, go a long way to winning customer loyalty and guaranteeing repeat business? Does not a customer service department, sensitive to customer needs, make an important contribution when it helps teach manufacturing personnel what they can and should do to make customers happy?

CSRs should stand ten feet tall. Just as salespeople, estimators, and production coordinators think of themselves as professionals, so should CSRs. Companies should position managers of customer service departments on the same level in their organizational charts as the heads of the sales and production departments.

What to Teach Salespeople

CSRs have a right to expect better behavior from salespeople. In fact, for the good of the entire company, they should consider it their responsibility to help make it happen. Here are some of the things CSRs should help teach sales reps to do:

- Write out a complete and accurate request for estimate.
- Send out a letter of quotation accurately stating the specs.
- Check with the CSR before promising delivery dates (so the CSR can check with scheduling/production).
- Learn exactly what the customer wants and needs.
- Obtain a complete and accurate purchase order.
- Obtain properly prepared copy, and/or disks.
- Go over the job with the customer, and iron out whatever problems there may be.
- Then go over the job with the CSR.
- Let the CSR know exactly what the customer wants and needs.
- Work with the plant only through the CSR.
- Let the customer know when copy is needed, and when okayed proofs must be returned.
- Negotiate selling prices.
- Handle complaints.
- Treat CSRs as equals, not as servants.



CHAPTER 9

Relations Between Production And Customer Service

CSRs should not have to plead with production people to get them to do the right thing.

Most customer service representatives (CSRs) have grievances against production people. Here are some of their more frequent complaints.

Complaints Against Production

- Production people are never willing to be interrupted.
- As a reflex action, they always reply, "It can't be done."
- They use heavy technical language that only they can understand.
- They fail to learn the end use of jobs.
- They blindly follow specs right out the window.
- They alter specs without telling customer service or sales.
- They put customer copy and disks into production, no matter how bad they are.
- They insist that if the customer okayed it that way, that's the way it will be done, whether it's right or wrong.
- They build a lot of hedge time into schedules, and therefore give slow turnaround times.
- They don't tell sales or customer service that jobs will deliver late until after they are late.
- They take forever to answer questions about when proofs will be ready.
- They send proofs out without first checking them.

- They refuse to make definite promises.
- They make promises, and then fail to keep them.
- They tell people what they think the people want to hear.
- They let mistakes happen.
- They never admit that anything is their fault.
- They have a policy of never letting salespeople or customer service reps feel secure.

Not every one of these complaints is valid in every place. But, to the extent that they are true, there is no excuse for this kind of behavior. CSRs should not have to plead with production people to get them to do the right thing for the company's customers. All they should have to do is let production know what the customer wants. After that, if at all feasible, production does the rest. When production fulfills customer service requests, they are not doing CSRs a favor -- they are helping the customer, and thereby, helping their company and themselves.

Role of Production

It is clearly the role of production to: Deliver all jobs to their correct destination, on time, undamaged, free of errors, at the proper level of quality, so that they will satisfy their end use, and delight customers, without causing worry for customers, or for sales reps, or for CSRs. No matter how good its CSRs are, companies cannot provide good customer service without good performance by production.

CHAPTER 10

Evaluating The Performance Of Customer Service Representatives

What counts now more than ever is that extra touch provided by well-trained, knowledgeable customer service representatives.

There are times when management has to make decisions about its customer service representatives (CSRs). Should that rep be kept on or let go? Is that one able to take on additional responsibilities? Can that one be trusted to interpret and apply company policies without having to seek permission from a manager? Should we give that one a raise? How big a raise? Which CSR is best able to handle that new sales rep?

What criteria are fair for judging the performance of CSRs? Let's look at some of the possibilities, one at a time, and decide.

Ways to Judge CSRs: Fair and Unfair

- By how hard they work? Is that a fair way to judge?

  Yes. Nobody wants a goof off. Besides, hard workers get more done in less time.

- By the dollar volume they handle?

  No, that's not fair. A large number of small, inexpensive jobs can easily be a lot harder to handle than a few big, expensive jobs.

- By the number of jobs they handle?

  No. How big are the jobs? How complicated are they? How accurate and complete are the original customer specifications?

- By the number of salespeople they work with?

  No. How many orders does each sales reps bring in, and how complicated are the jobs? To what extent do the sales reps make it hard or easy?

- By how well they communicate with customers?

  A resounding "yes." That's the most important thing CSRs do. They are a major liaison between customers and production. Unless they ascertain exactly what customers want and need, and unless they effectively convey that knowledge to production, there is no way companies can even begin to satisfy their customers.

- By their willingness to learn about printing?

  Yes. CSRs cannot communicate printing information without understanding its terminology, and without knowing a good deal about the technology. If they try to fake it, they will only create confusion, and do great harm. There is much to learn, and it requires many hours to learn it. Company managers should help make time and training available.

- By how diligently they work to get all job specifications on time?

  Yes. Without information, production cannot go forward. When all of the specifications do not appear on the purchase order, and salespeople fail to get them, CSRs are counted upon to badger customers for the missing instructions.

- By whether they work effectively to get jobs delivered on time?

  Yes. When delivery dates are not provided, CSRs are counted upon to find out precisely when customers need their jobs to be delivered. They must convey that information to production, win promises from production, obtain schedules and convey them to customers and sales, and remain aware of how jobs are progressing.

- By their awareness of the status of jobs?

  Yes. If something isn't happening that should be happening, CSRs should remind production that it needs to happen. When customers call wanting to know when they will get proofs, or when their jobs will be delivered, CSRs should not have to say, "I'll find out, and call you right back." That makes customers nervous. It makes it seem that nobody is watching after their work. CSRs should have that information at their fingertips. In fact, they should inform their customers before their customers think to call them.

- By how many mistakes they make?

  Yes. The more mistakes CSRs make, the more dangerous they are to have around. They must be careful. If they are not sure of something, they should check with someone who is.

- By the cost of their mistakes?

  No. That is largely accidental. A mistake that is made on a job that happens to be large, is far more costly than the exact same mistake on a job that happens to be small.

- By how well they learn from their mistakes?

  A definite "yes." CSRs who make the same mistakes over and over again are even more dangerous than CSRs who make a lot of mistakes, all of them different.

- By what customers say about them?

  Yes. Even if bad things customers say are not justified, CSRs cannot do a good job unless customers think highly of them.

- By how well they work with salespeople?

  Yes. A major reason CSRs exist is to make it more possible for salespeople to sell. That includes working in such a way as to ensure that sales reps feel safe and comfortable working with them.

- By whether they work well with estimators and production people?

  Yes. Good CSRs are so smooth, and so nice to work with, that it becomes a pleasure to accommodate requests that come through them. That's far better than having estimating and production constantly complain about unreasonable customers, and demanding salespeople.

- By how well they work with other CSRs?

  Yes. CSRs need to take lunch and other breaks. When there is more than one CSR, each one of them should be glad to cover for another one. The same goes for times when a particular CSR becomes swamped with too much work. Help should be freely requested, and freely given.

- By how well they set priorities?

  Yes. Tasks don't come at CSRs in the sequence in which they need to be carried out. The last in may very often have to be the first one out. CSRs must be able to figure out what is the right thing to work on at the right time.

- By how well they handle pressure?

  Yes. Nobody has been able to, and nobody can, find a way to protect CSRs completely from pressure. CSRs who cannot handle pressure are in danger of cracking up, and at the worst times.

- By whether they anticipate possible emergencies and help to head them off?

  Yes. Everybody knows that it is better to prevent fires than to scurry around frantically putting them out. Averting emergencies maintains the possibility of doing good work without needless waste, and without frayed nerves.

- By the extent to which they help improve upon existing systems?

  Yes. Alert CSRs are aware of what makes customers happy, and what causes them to be unhappy. They should, at all times, watch for internal weaknesses that lead to customer disappointment. Moreover, they should participate in identifying and fixing problems.

- By how much they learn about their customers' businesses?

  Yes. The more CSRs know about the companies they work with, the more able they are to fully understand what customers need, and the more possible it becomes for them to offer effective ways to meet those needs.

- By whether they make efforts to meet customers personally?

  Yes. The more complete the relationships between CSRs and customers, the more likely it is that they will work well together.

- By the personal touches they add to relations with customers?

  Yes. Birthday and anniversary cards, congratulations upon a child's graduation, discussion about yesterday's ball game, just friendly chit chat all help to build good relations, and to increase customer loyalty.

- By the amount of repeat business they help to bring in?

  Yes. When customers send orders directly to CSRs without thinking it necessary to go through a salesperson, that's a clear sign that those CSRs are doing something right.

A Revealing Survey Of Company Presidents

How well CSRs perform really matters. This survey was taken quite some time ago, but the results are still very meaningful. It was conducted by Printing Industries of America. They addressed this question to fifty company presidents: "How do you classify yourself, as a manufacturing company or as a service company?"

Twenty-three classified themselves as manufacturing. Of these 23 companies, 21 were making a low profit (2% or less on sales).

Twenty-seven classified themselves as service. Of these 27 companies, 23 were high profit (10% or more on sales).

What was true then is clearly even more true today. Putting good ink on good paper and doing it fast and at low prices are not good enough. Customers now take it for granted that printers will supply good quality, fast turnaround, and decent prices. That's nothing special any more. What counts now, more than ever, is that extra touch, that willing, friendly, and competent service provided by well-trained, knowledgeable customer service representatives.

USEFUL READING MATERIAL

It's a fundamental truth that nobody can be a good customer service representative (CSR) without knowing a lot about printing. As an aid to learning more, here is a list of books and magazines that contain a wealth of useful information about printing.

Monthly Magazines

American Printer
29 N. Wacker Drive
Chicago, IL 60606

Graphic Arts Monthly
249 West 17th Street
New York, NY 10011

Printing Impressions
401 North Broad Street
Philadelphia, PA 19108

It is sufficient to subscribe to any one of these three magazines. Each is extremely useful, especially for learning about new technology and recent developments in the printing industry. Companies that purchase printing equipment or supplies are able to obtain free subscriptions.

Books

Getting It Printed
by Beach, Shepro, Russon
North Light Books,
1507 Dana Avenue
Cincinnati, OH 45207

This book is addressed to print buyers. Its aim is to teach buyers what they need to know in order to work with printers intelligently. With the exception of the new digital technology, it contains all of the fundamentals ranging from typography through binding and finishing. Unlike most textbooks, it reads very easily.

The GATF Encyclopedia of Graphic Communications
by Frank J. Romano and Richard M. Romano
GATF Press
Graphic Arts Technical Foundation
200 Deer Run Road
Sewickley, PA 15143

This is truly a comprehensive encyclopedia. It defines all the terminology and explains all of the processes. Published late in 1998, it is thoroughly up-to-date.

Pocket Pal, A Graphic Arts Production Handbook
International Paper Company
6400 Poplar Avenue
Memphis, TN 38197

This is the kind of book you want to keep on your desk as an ideal quick reference book.

ABOUT THE AUTHOR

Don Merit is a nationally recognized consultant in printing management, production, and estimating. He spent many years in managerial positions with some of the finest printing plants in the New York City area. During these years he worked closely with customers, designers, and sales people helping to budget, engineer, schedule and carry out complex printing projects. As a director of production and estimating, he was deeply involved in the tough problems printers face every day.

Since 1983, he has been working as an independent consultant to both commercial and in-plant printing firms in all parts of the country. In addition, he is a non-resident consultant for the National Association of Printers and Lithographers (NAPL).

Mr. Merit taught courses and seminars for the PIA affiliate, Association of Graphic Communications' Center for Graphic Arts Education for more than twenty years. He is the 1992 recipient of the Center's Outstanding Teacher Achievement Award. In addition, he was a lecturer for The Rochester Institute of Technology for thirteen years. His subjects have been: How to Buy Printing, The Language of Printing, Production Management, Scheduling Production, Advanced Estimating, Customer Service, and Training Supervisors to Manage. He is a contributing editor to *American Printer* magazine, and a cum laude graduate of The City College of New York.

He is the author of three other booklets: *Excellence in Scheduling Print Production, Production Management in the Graphic Arts*, and *Estimating it Right: A Guide for Graphic Arts Estimators and Production Managers.*

The name of Mr. Merit's consulting firm is Don Merit, Graphic Arts Consultant. It is located at 161 Austin Drive, Unit # 8, Burlington, Vermont 05401. Phone (802) 862-2531.