



Organizing etiquette: simple tips to get great customer service

May 13, 4:58 AM ■ [Get Organized Examiner](#) ■ Vicki Hancock

By organizing your paperwork and your thoughts, you can get great customer service.
photo by CSPT

Related articles

[Getting organized is habit-forming](#)

[Define your clutter to get organized](#)

[Organize yourself to save big money using coupons and promotion codes](#)

[It's easy to be green by forming a few habits](#)

[Organizing your home office increases your productivity](#)

The product you bought doesn't fit, doesn't work the way you expected, or arrived damaged. The service you received just didn't meet your needs. You need to contact or visit customer service to correct the situation.

By gathering some information and organizing your thoughts, your customer service experience can be a pleasant one for both you and the company

representative, whether by phone, email, or in person. Use these tips to have a successful - and even pleasant - customer service experience:

1. **Begin by doing your homework.** Become familiar with the customer service policies of the company you'll be dealing with. Most companies make these policies available on their web sites, and they provide useful insights into what to expect and how to contact the right person or department with your complaint.
2. **Approach the situation as a problem to be solved.** By starting the conversation with a pleasant attitude and an open mind, you have a better chance to resolve your issue with minimum stress.
3. **Be clear about your complaint.** Describe the problem as briefly as possible, and have in mind what action you want the customer service rep to take: refund, replacement, repair? Also, consider being flexible. You might find that the company is willing to do more for you - to keep you as a good customer - than you originally expected.
4. **Provide documentation.** Be prepared with receipts, order numbers, confirmation notices, and any other proof of purchase or warranty to help you make your case.
5. **Escalate only if necessary.** Like any other employee, customer service reps are trained and paid to help you themselves; they don't want you to demand to speak to their manager. This creates an adversarial relationship. Instead, if you reach an impasse, ask to speak (or send email or write) to someone who has the authority to resolve the issue (remember step #2 above). If you do escalate, be sure to get a specific name, title, and contact information.
6. **Keep expectations realistic.** The results you get when dealing with a discount department store will be very different than with a high-end specialty boutique.
7. **Make it a habit to praise excellent service.** If you take some time and energy to call attention to those who serve you effectively and with a smile, you'll be helping to assure that all of us are more likely to benefit from excellent customer service in the future. It certainly can't hurt!

Customers who make their requests with information and courtesy are more likely to have a pleasant, minimum stress customer service experience. For more customer service tips:

- [HowToDoThings.com](#)
- [Forbes.com](#)
- [NetM@nners.com](#)

Share your customer service experiences and tips here!