



# Customer Service

## 7. Visiting the customer

Visiting a customer can be an important business activity and may be one of the few times that a customer actually gets to meet you or a representative from your business.

It is critical to make appointments for a time best suited to the customer. Equally important is your reliability. Customers prefer to have arrangements made that are achievable rather than promises that aren't met.

Visits can be for a variety of purposes, including:

- sales visits, preparing quotes
- inspections and assessments
- delivery and installation
- repairs and maintenance.

Visits can be on a regular basis, such as maintenance or service checks, or on an adhoc basis, such as repairs or deliveries. Some visits can be planned and anticipated well in advance while others are the result of an unexpected event and require urgent attention.

The duration of the visit can also vary in terms of how long you are at the customer's home or business. When visiting a customer ensure you arrive on time. If for whatever reason there is a delay, then it is imperative that you contact the customer as soon as possible to allow them to plan accordingly.

There are three main stages associated with any visit, including:

- making arrangements for the visit
- when at the customer's premises
- any follow-up after the visit.

To assist you to best deal with visits to the customer's premises, follow the checklist on the next page.

## Checklist - Visiting the customer

### 1. Making arrangements before the visit

- ▷ Arrange an appointment to visit at a time that best suits the customer.
- ▷ Be specific about the appointment time rather than giving a range of time.
- ▷ Provide the customer with the name and contact details of the person visiting them.
- ▷ Provide the customer with a contact number for reference if they have any queries regarding the visit.
- ▷ Where the visit has been planned well in advance (i.e. more than a week), confirm the visit with the customer ideally around 2 days before the visit.
- ▷ Advise the customer of what they need to do in preparation for the visit (where it involves special arrangements).
- ▷ Arrive at the time expected.
- ▷ If the visit is delayed by you or your organisation, immediately contact the customer to advise of the delay. If arriving late is not suitable for the customer, arrange for an alternative time that does suit them. Apologise for any inconvenience you may have caused the customer.
- ▷ On arrival, show proof of the organisation that you represent.

### 2. During the visit

- ▷ Meet the customer who made the arrangements and discuss what you understand is involved.
- ▷ Conduct the visit with a minimum of disruption to the customer.
- ▷ Keep the customer informed of progress during the visit, especially if you are working at the premises and have to leave them at any time.
- ▷ Leave the premises in the condition you found them.
- ▷ Before you leave, confirm and explain to the customer what was done.
- ▷ Leave the customer with a record of the visit, and contact details for any further queries.
- ▷ Farewell the customer as you leave.

### 3. After the visit

- ▷ Ideally within 2 days, follow-up to check everything is as the customer expected.

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We also provide services at the following locations:

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