

Holiday Season Customer Service Tips: Ordering and Shipping 1

Collecting Complete Customer Information (see mock order form)

- Fill out the order form for the customer. This ensures legibility, and convenience for the customer.
- Put your name on the form so other staff can ask you if they have questions.
- As a general rule, fill out all the fields.
 - Telephone number: Critical...we must be able to contact the customer, if there are questions.
 - E-mail: Also critical...so we can send customers shipping and delivery notifications.

Always ask customers if they would like to include a gift message. If they are in the store, they can write it themselves and we can attach the card to the order form.

Make note of any extras or alterations to gift sets in the Notes Section.

We have an electronic form available on the computer for customers to fill out. This is the only case in which it is acceptable to allow the customer to fill out the form.

Registering Payment

Goal: All orders are rung up at time of purchase so we have no follow up.

- Predetermined Gift Sets: Search the name of the gift set in the system and ring up the price.
- Customized Orders: e.g. 1/2 pound of Evalon, 3/4 pound of Truffle Gouda. Ring up each item individually and include a \$5.00 packaging fee. Search cheese in the system and charge appropriate amount for desired weight. We will cut cheese to order at a later time and get as close as we can.

Don't forget to:

- charge for shipping
- attach the receipt

Walk-In Orders

- Show customers our Holiday Catalog or direct them to the website to see gift baskets.
- Don't ask the customer to fill out paper order forms. (Have order forms available for you to fill out.)
- When the customer is ready to order, move to side or back of store and fill out the form for them.
- Start by asking for the package's destination. This allows you to determine the shipping rate right away without any surprises or cancellations after you've filled out the entire form.
- Make sure to get gift message; attach to the form if they write it in the shop.
- Ask when they would like order to arrive - determine shipping date based on method.
- Double check all information.

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Customer Additions to Gift Sets

Example: “I want to order the *Cheese Stands Alone* gift set and add crackers.”

- Charge for Cheese Stands Alone gift set and charge crackers separately at their normal retail price.
- Note the addition on the order form.

Customized Gift Sets

- Charge all items at normal retail price.
- Charge a \$5.00 Packaging Fee to cover our boxes, ice packs, and other packing materials.

Multiple Gift Sets

Do not ask customers to fill out more than one form.

- Option 1: Fill out a form that has the customer's name, e-mail, telephone number and best time for the Business Office to call them. Put it in the pocket on the kitchen whiteboard.
- Option 2: Ask customer to send a list of addresses and name of gift set they're ordering to orders@fromagination.com

Resending Last Year's Gift Sets

Fill out form that has customer name, e-mail, telephone number and best time for the Business Office to call them. Let customer know we will pull their file and get back to them. Put in pocket on kitchen whiteboard.

Customer Add-Ons

- List any extra items on the order form.
- Put those extra items in a labeled bag in the back room on the rack labeled “Special Customer Orders.”

Busy Shop with Many Customers Waiting to Order

- Talk to customers who are waiting, and let them know how long the wait will be.
- If they are unwilling to wait, fill out a form with name, e-mail, telephone and best time to call. The Business Office will call them later to take their order. Put it in the pocket on the kitchen whiteboard.

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Internet Orders

- The Business Office solves problems involving online orders.
- Example: If a customer calls and is having problems shipping or cannot figure out how to ship to multiple addresses online, fill out a form with customer name, e-mail, telephone, and best time to call them. Put it in the pocket on the kitchen whiteboard.

Fielding Telephone Calls

Assess every call for degree of urgency.

If they are ordering gift baskets or catering for a future date, fill out the form with name, e-mail, telephone number, and the best time to call. Put it in the pocket on the kitchen whiteboard.

Checking on the Status of an Order

1. Fill out the form with the following information:
 - Date of order
 - Method of order (in person? online? on the telephone?)
 - Customer's name
 - Name of recipient, and city and state
 - Customer's telephone number, and the best time to call them back
2. Place in the message pocket on the kitchen whiteboard.
3. The shipping department is responsible for calling customers with tracking information and the estimated day and time of arrival of the package.