

Enhance the Power of Customer Service Representatives: Lessons to be Learned from a Business Case Study ¹

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Identify the Customer for every task or promise.
Both parties must understand what is to be delivered,
when it is to be delivered, and how the progress is to be reported.

Francis J. Kong

INTRODUCTION

A recent Project Management Institute (PMI) survey² revealed a dearth of project management applications in the business management marketing sector; to its detriment. Apart from the focus of that survey -- *effective campaign management to attract new customers* – the other key aspect of marketing management is retaining existing customers; as *Repeat Customers* are the lifeblood of companies. This case study highlights the crucial need to also inject some systematic project management principles and approaches in that latter mode.

The Rationale: Customer Service Representatives (CSRs) are the linchpins to retain customers, as customers regard CSRs as ‘The Company.’ However, despite their critical role, *even with people-pleasing personalities*, when organizationally-isolated at the end of the company sales-chain, CSRs are rendered powerless. This is a major shortcoming, because **every Process is a Project**: i.e. ‘*Start – Do – Finish*,’ and many sales are **Process-type Projects**.

Unfortunately, in sales, occasionally things ‘go south’ and whenever that happens -- *remote from substantive internal company activities*, the essential CSR function is preempted in favor of merely being a bulwark against customers wanting refunds &/or restitution. Consequently, customers become aggravated as handicapped CSRs proffer apologies, platitudes, and belated reactions, rather than swift action & remedial results. Subsequently, hapless CSRs receive the brunt of customer wrath, **but in the long run it is the company image that suffers most**. It is vital therefore that CSRs be strategically re-situated and strengthened -- *in a project management manner* -- to resolve such issues; *and reinforce* a favorable company image.

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² <https://leadership.ng/97-of-creative-agencies-grapple-with-campaign-execution-challenges-report/>

The Missing Millions: Anatomy of a Customer Complaint

This business case³ highlights the inadequacies of Customer Service Representatives (CSRs) dealing with Process-type sales. Step-by-step, an inadvertent, *but nevertheless progressively-dysfunctional* performance by several powerless CSRs furthers a distraught customer's disaffection; completely undermining company marketing efforts.

I'm uncertain how prevalent this practice is, but -- *as it is contrary to standard operating procedures for monitoring, coordinating & reporting project status to clients* -- hopefully where it prevails, insights from this case *coupled with Francis Kong's authoritative admonition* will provide sufficient impetus for enlightened executives to restructure their organizations into more closely-knit teams; with CSRs taking a stronger role to coordinate customer servicing.

Feel free to utilize it in your own teaching programs.

1. THE COMPANY

Trophy-Trove Inc.

Designer, manufacturer & seller of trophies, plaques and customized awards

2. THE PROMISE

Fast turnaround time. Ready in just 5 days after lay-out approval.⁴

Free delivery in the local area.

Above all, we have exceptional customer service!

We truly put the spotlight on you,

Allowing you to focus on every other detail of your event.

³ Outlined herein as it transpired with time-markers and clarifying comments, but without embellishments or omissions. The name of the company has been fictionalized, and identities of the parties involved have been concealed for privacy purposes.

⁴ The 5-day turnaround time applies to standard orders and may vary depending on the quantity.

3. THE PROPOSAL & CONTRACT

DAY 1 11:30 AM

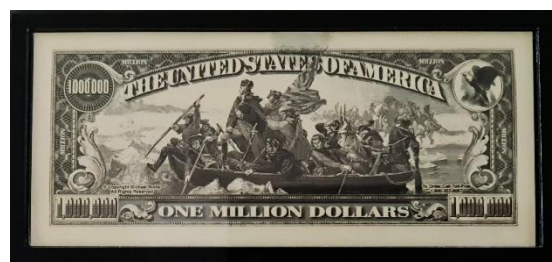
Customer In-Store Visit, & Request for a Product to be Manufactured

Can you please produce one hundred acrylic paperweights embedded with fake U.S. Million Dollar bills⁵ as per the sample provided?

Figure 1



Obverse



Reverse

COMPANY ACCOUNT EXECUTIVE: – ON LINE RESPONSE TO CUSTOMER – VIA STORE SALES REPRESENTATIVE

Thank you for inquiring about our company. I'm pleased to present the proposal from our Production Department.⁶ Should you have any questions or concerns, please don't hesitate to reach out, and I'll be happy to assist you in any way I can.

Thank you again, and I look forward to the opportunity to work with you on this project.

Best regards, **Account Executive 1**

Amount:	\$637
Rush Fee:	\$ 64
Add 12% Vat:	\$ 84
Total Amount Due:	\$785

Customer to In Store Sales Rep 1: PAID in Full, in Advance.

⁵ Green Mountain Direct Set of 100 'Million Dollar' Bills; provided by the customer. [FYI: These are also available from Amazon @ \$17.95 + shipping.]

⁶ NOTE: **PERTINENT CLAUSE 11. FORCE MAJEURE**

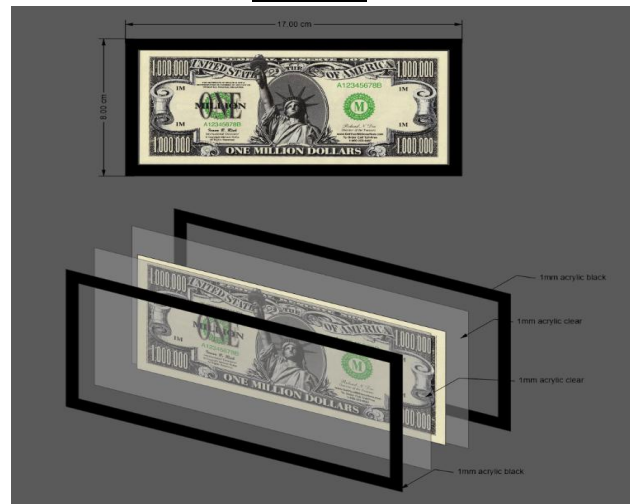
Neither party is liable for delays due to unforeseen circumstances beyond its control,

**ALMOST ALL SUBSEQUENT COMMUNICATIONS BETWEEN
THE COMPANY AND THE CUSTOMER -- *BY VIBER CHAT***

DAY 7 4:23 PM

Company Rep 2 to Customer Rep and Customer: Please check for approval
[Photo attached]

Figure 2



Company Rep 3 to Customer: For your approval

DAY 8 5:27 PM

Customer to Company Rep 2 and Company Rep 3: OK Looks good. Thank you
Company Rep 3 to Company Rep 2; copy to Customer: Proceed

DAY 9 10:00 AM

Company Rep 4 to Company Rep 3; copy to Customer: Project sent to our Production Department

Company Rep 3 to Company Rep 4; copy to Customer: Thank you

Company Rep 4 to Company Rep 3; copy to Customer: It's a pleasure sir

SUMMARY:

**100 PAPERWEIGHTS CONTRACTED FOR;
AND AT LEAST 10 PIECES**

TO BE EXPRESS-DELIVERED TO CUSTOMER BY DAY 17

4. THE PERFORMANCE

8 DAYS -- DEAD SILENCE **NOTHING DELIVERED BY DAY 17**

DAY 18 5:00 PM [Close of business day]

STILL NOTHING HEARD FROM COMPANY

6:27 PM

Customer to Company Rep 3: My items are overdue. Are they ready yet? Were they going to be delivered to my address or your store?

6:50 PM

Company Rep 3 to Customer: Good evening, sir. I'll update you sir.

Company Rep 3 to Company Rep 4; copy to Customer: Please update me tomorrow about the customer's request.

DAY 19

8:31 AM

Company Rep 4 to Customer: Good morning. This is noted. We will send you an update today sir.

Customer to Company Rep 4 & Company Rep 3: Good Morning. My understanding was your company would have **at least 10 items available by Day 17**. Fyi I will be out all day. If you are delivering to my residence, please leave at the lobby desk. Thank you.

1:55 PM [Missed call]

Customer to Company Rep 4: Missed your call. please text me your message.

2:03 PM

Company Rep 4 to Customer: Regarding your order sir. **We are unable to provide black borders.** Is that OK sir?

Customer to Company Rep 4: Any color is OK, or are you saying no border at all?

Company Rep 4 to Customer: If we put a border is any color OK?

Customer to Company Rep 4: Yes. When are you going to deliver the first 10, and where?

Company Rep 4 to Customer: **This week.** I hope that's OK; then **next week we will provide another 20 pieces.**

DAY 19 Continuation of 2:03 PM Viber chat

Customer to Company Rep 4: I'm disappointed. It's too late now for immediate use. The first batch were to be awarded tomorrow. So send 30 next week.

**NOTE: AFTER EIGHT DAYS OF SUPPOSED WORK,
& THREE DAYS AFTER THE SCHEDULED DELIVERY DATE,
ONLY NOW -- AFTER THE CUSTOMER FOLLOWED UP --
IT IS APPARENT TO THE CUSTOMER THEY HADN'T EVEN STARTED!**

Company Rep 4 to Customer: Sir: is it okay for the borders to be 2mm, clear acrylic, because the size available here in our warehouse is 2mm?

Customer to Company Rep 4: OK if it doesn't come apart!

Company Rep 4 to Customer: Can you please give me the delivery address sir?

Customer to Company Rep 4: address provided.

**NOTE; THAT WAS ALREADY PROVIDED SEVERAL WEEKS AGO!
WHERE DID THEY THINK THEY WERE TO DELIVER ON DAY 17?**

Company Rep 4 to Customer: Thank you so much. Do you need a photo reference?

Customer to Company Rep 4: No. Just let me know when delivery is anticipated and I can inform the lobby security; and don't forget to return the sample I gave you.

2:34 PM

Company Rep 4 to Customer: Sure sir. Thank you again sir for your patience and understanding.

Customer to Company Rep 3: Now Customer Rep 4 tells me they can't do what was promised, nor meet the delivery deadline!

I have now compromised on the border & delivery date; missing my first award ceremony. It may be good quality when it eventually arrives, but your service is totally unreliable!

5:09 PM

Company Rep 3 to Customer: Sorry for that sir. I told **Company Rep 5** to finish this.

DAY 20

4:11 AM

Customer to Company Rep 4: **Don't presume my patience & understanding!**

In fact, 2 days after the scheduled delivery date for the first batch of my order,

I was shocked to learn your company hadn't even started production;

the reason being you don't have the capability to produce the design agreed upon;

but waited until I followed up to inform me of the situation.

FYI: I am not a patient man, and I still don't understand!

DAY 20 Continued

9:25 AM

Company Rep 4 to Customer: I'm really sorry for that Sir. I will do my best to provide your items you need **this week**.

Customer to Company Rep 4: Sorry is not an acceptable excuse for poor performance! In the military it is dereliction of duty. In the private sector it is breach of contract. Furthermore, since you missed my original deadline it is too late for my immediate 'need'. I just want to get this situation over ASAP.

TWENTY MORE DAYS OF DEAD SILENCE !

DAY 40

1:18 PM

Customer to Company Rep 4: It is now going on to the 4th week--after the original contract deadline for delivering my paperweight awards, but I haven't had a peep from you.

FYI I have another course next week, so could you please deliver AT LEAST 10 out of the 100 contracted for.

1:22 PM

Company Rep 4 to Customer: Sorry sir for the updates and replies that I haven't been able to provide. I'm on my way to production to get updates regarding our project. Sorry, I'll give you an update once I get to production.

2:01 PM

Company Rep 3 to Company Rep 4: How is the project still going on? It's been 4 weeks now!

5:37 PM

Company Rep 3 to Company Rep 4; copy to Customer: Please update me on the customer's 10 pieces.

6:24 PM

Customer to Company Rep 4: So what's happening -- or not?

DAY 41

8:59 AM

Customer to Company Rep 4: Another day, and still no response from you.

11:22 AM

Company Rep 3 to Customer: Sorry for late revert sir. I already coordinated with my supervisor. Here is our CSR who can check on our production team sir

Customer to Company Rep 3: I'M SORRY TOO -- HE'S THE ONE WHO HASN'T BEEN RESPONDING TO ME! What is the Company HQ address? If he doesn't respond today, I'm going to go there tomorrow and confront them.

DAY 41 Continued

1:23 PM

Customer to Company Rep 4: Did you get to production yet? It is now 24 hours since I last heard from you - when you promised to call and give me an update - despite two follow-up text attempts by me here, several live phone calls were not accepted! What's the status now? When will my paperweights be delivered?

1:42 PM

Company Rep 4 to Customer: Sir, I sincerely apologize for the late reply. To be fully transparent with you, our acrylic cutting is still in progress because we encountered an issue with our machines. I deeply apologize for the inconvenience.

Customer to Company Rep 4: *What! So after a month you STILL haven't started?*

Company Rep 4 to Customer: Half begun, sir. However, the other ones are being repeated because our cutting machine malfunctioned.

Customer to Company Rep 4: Does that mean half finished & ready for delivery?

2:02 PM

Company Rep 4 to Customer: The cutting is complete, sir. It's not entirely finished yet, but we will do our best to assemble the paper and acrylic together.

Customer to Company Rep 4: Then try and **deliver to me at least Ten sets by close of business Day 46**, so I can use them on Day 47. Do you think your company can do that?

Company Rep 4 to Customer: We'll do our best to do that sir.

Customer to Company Rep 4: Thank you.

Company Rep 4 to Customer: Also thank you sir for understanding.

DAY 44

2:06 PM

Customer to Company Rep 4: What's the likelihood of delivering 10 by COB **Day 46**?

NO RESPONSE

DAY 46

12:56 PM

Customer to Company Rep 4: Am I getting a delivery today?

3:16 PM

Company Rep 3 to Customer: Tomorrow sir.

Customer to Company Rep 3: OK. Thank you. FYI I will be out, but deliver and leave with the receptionist in the lobby.

DAY 47

5:30 PM

Customer PHONE CALL to Company Rep 3: No RESPONSE

5:36 PM

Company Rep 3 to Customer; Local Phone Call: Hi sir sorry to drop your call. I'm on my way home. I'll call you back sir

5:38 PM

Customer to Company Rep 3: I just got home. Nothing delivered yet.

DAY 48

9:01 AM

Customer to Company Rep 3: It's 9 am, Day 48, and I've still got no response – or delivery – from you. Nothing was delivered yesterday, and I've still had no response from Customer Rep 4.

DAY 49

7:41 AM

Customer to Company Rep 4: It's morning Day 49, and still no response – or delivery – from you.

7:48 AM

Customer to Company Rep 3: It's morning Day 49. Nothing delivered yesterday, and still no response from customer service.

3:09 PM

Company Rep 4 to Customer: Sorry for the late revert. Here's the update sir.

Figure 3



Figure 4



3:42 PM

Customer to Company Rep 4 and Company Rep 3: Are you showing me that only 2 have been completed so far?

NO RESPONSE

DAY 50

7:30 AM

Customer to Company Rep 4 and Company Rep 3: Another day, another "NO RESPONSE" from supposed Customer Service Representatives!

7:57 AM

Company Rep 3 to Customer: Good morning sir. Sorry for the late revert. I contacted production and they already made 30 pcs out of 100.

Customer to Company Rep 3: So why didn't I get the 10 earlier this week when I asked for and needed them?

Company Rep 3 to Customer: Sorry for that sir. Later when I'm in office I'll inform them to send you the partial quantity. Thank you for waiting sir.

Customer to Company Rep 3: That wasn't my question! Too late now to meet my need. The course is over! Again!

I repeat WHY WEREN'T THE 10 DELIVERED ON DAY 47 AS PROMISED?

Company Rep 3 to Customer: Sorry for that sir. They told me they could provide 10 pcs. I did not expect our acrylic machine would have maintenance problems.

Customer to Company Rep 3: So why wasn't I informed ASAP. Not me having to follow up with you all the time. I was unable to meet my award events because of your company's failure to meet 1) its contractual agreement, 2) your failure to keep me informed, and 3) my expectations!

8:15 AM

Company Rep 3 to Customer: Sorry for that sir. I hear your concern, but I've had to follow up several times myself. Let's both commit to clearer, more consistent communication moving forward sir.

8:55 AM

Customer to Company Rep 3: I want a meeting with your company manager next week. Please arrange that. Tell me who I will be meeting, when and where.

9:29 AM

Company Rep 4 to Customer: Good morning, sir, I'm so sorry for the late response, but here's the update sir.

Figure 5



We have 30 pcs completed.

DAY 50 Continued

10:59 AM

Customer to Company Rep 4: SO, WHERE ARE THEY? I ASKED ON DAY 42 --
A WEEK AGO -- FOR 10 TO BE DELIVERED TO ME BY DAY 46!

IT IS DAY 50 NOW. SO WHY WERENT 10 DELIVERED EARLIER IN THE
WEEK IN TIME FOR MY COURSE?

11:39 AM

Company Rep 3 to Customer: I just followed up with my supervisor sir how many we
can deliver today. Just checking the quality.

11:50 AM

Customer to Company Rep 3: DONT FORGET TO INCLUDE MY SAMPLE THAT
I PROVIDED ON DAY 1.

UNFORTUNATELY, THEY ARE TOO LATE FOR USE IN THIS COURSE,
BUT A BIRD IN THE HAND IS BETTER THAN TWO IN THE BUSH.

5:30 PM

**CUSTOMER ON THE WAY HOME FROM HIS COURSE
RECEIVES A PHONE CALL FROM COMPANY REP #5.
CUSTOMER ASKS FOR A TEXT MESSAGE:**

Company Rep 5 TEXT to Customer: Good afternoon. This is the Supervisor of Customer Rep
3 who spoke with you earlier. Regarding your project **it will be delivered tomorrow -- DAY 51**
-- at the said address. And if you want to talk to our manager he is available on DAY 53 at XXX
from 9am to 4pm. Thank you and have a great day ahead.

DAY 51

9:01 AM

Company Rep 6 to Customer: Good day. Kindly send delivery address & contact no.

10:14 AM

Customer to Company Rep 6: Information Re-sent

3:56 PM

Customer to Company Rep 6: 30 pieces received. Thank you.

NOTE: THEY DID NOT INCLUDE THE SAMPLE PROVIDED!

DAY 54

3:57 PM

Customer to Company Rep 6: 70 manufactured pieces received in good order,
BUT THE SAMPLE WAS NOT INCLUDED!

**FINAL NOTE: IN ADDITION TO THE FOREGOING TEXTS ON VIBER
-- THE PRINCIPAL MEDIUM OF COMMUNICATION --
THE COMPANY WAS CALLED NUMEROUS TIMES
BUT THE PHONE RANG AND RANG WITHOUT ANYONE ANSWERING.**

5. CASE EXERCISE

SEE PROCESS SUMMARY BAR CHART ON THE FOLLOWING PAGE

GROUP DISCUSSION OF THESE &/or Other ISSUES

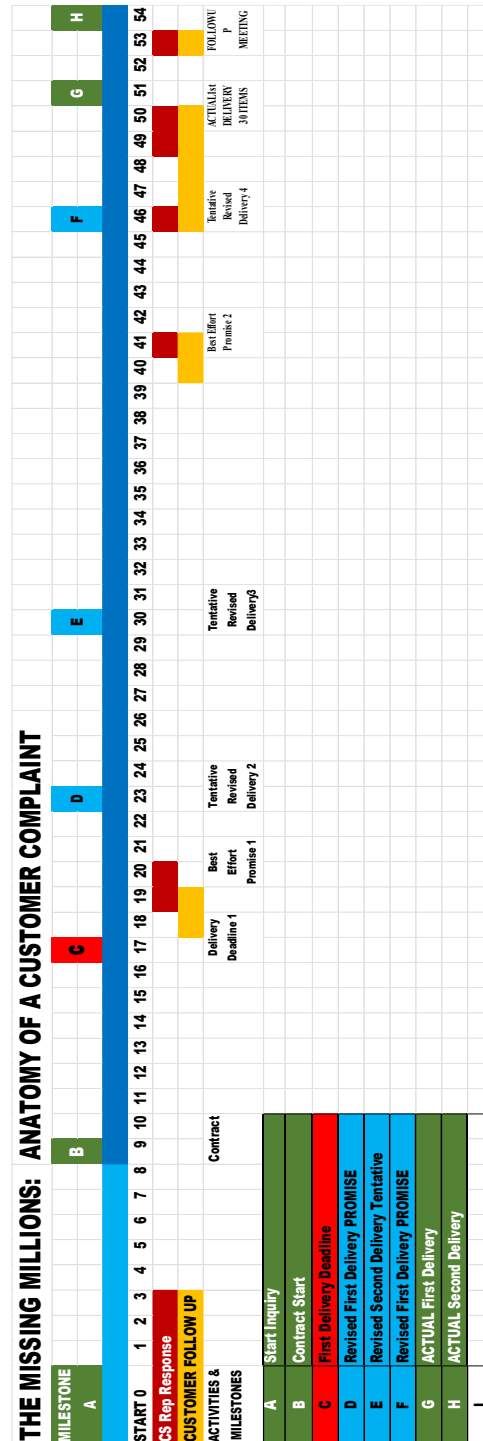
- Multiple Customer Reps; but No integrated 'Team'.
- Who – if anyone -- was in Charge? *Company Rep 4; 3; ?* Who should be?
- No one apparently responsible for tracking Product Status
- All Customer Reps Passive and Reactive to Customer inquiries, rather than one Proactively monitoring the product progress in the Production Department, and keeping Customer informed of its development status.
- Customer had to Follow-up, rather than being kept informed of status and issues affecting design, and delivery delay.
- **Company Organization:** Apparently organized & managed
 - by Functional Departments for internal 'Efficiency,' rather than
 - by Products for external 'Effectiveness' to service Customers
- Multiple Apologies and 'Sorries' rather than Results
- Numerous Promises made, but apparently without basis or follow-up; & not Kept
- *Does machine malfunction rise to the level of Force Majeure?*
- FAILURE OF COMPANY PROMISES ON ALL COUNTS
- What should be appropriate Restitution & Resolution?
- In your opinion, is this scenario a common occurrence, or an outlier?

Conceivably, every customer's order of a Product process sale could be treated as a Project, where the CSR acts more like a project manager from the outset -- *or at least when apprised of a potential problem* -- monitoring the process and periodically reporting to the customer on the status of its products from inception to completion, and final disposition.

For further Guidance, Ideas &/or Inspiration-triggers, see the monthly on-line Project Management World Journal (PMWJ) &/or the PM World Library at <https://pmworldlibrary.net/authors/>

6. YOUR CONCLUSIONS & RECOMMENDATIONS?

Figure 6



About the Author



Dr. Kenneth Smith

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Initially a US Civil Service Management Intern, then a management analyst & systems specialist with the U.S. Defense Department, Ken subsequently had a career as a senior foreign service officer - management & evaluation specialist, project manager, and in-house facilitator/trainer - with the US Agency for International Development (USAID). Ken assisted host country governments in many countries to plan, monitor and evaluate projects in various technical sectors; working 'hands-on' with their officers as well as other USAID personnel, contractors and NGOs. Intermittently, he was also a team leader &/or team member to conduct project, program & and country-level portfolio analyses and evaluations.

Concurrently, Ken had an active dual career as Air Force ready-reservist in Asia (Japan, Korea, Vietnam, Indonesia & Philippines) as well as the Washington D.C. area; was Chairman of a Congressional Services Academy Advisory Board (SAAB); and had additional duties as an Air Force Academy Liaison Officer. He retired as a 'bird' colonel.

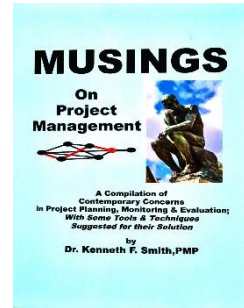
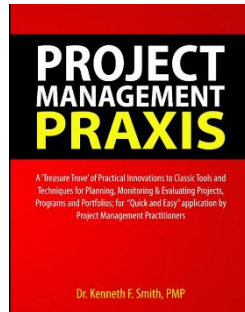
After retirement from USAID, Ken was a project management consultant for the World Bank Group, UNDP, the Asian Development Bank (ADB), African Development Bank (AfDB), as well as USAID.

He earned his DPA (Doctor of Public Administration) from the George Mason University (GMU) in Virginia, his SM from Massachusetts Institute of Technology (MIT Systems Analysis Fellow, Center for Advanced Engineering Study), and BA & MA degrees in Government & International Relations from the University of Connecticut (UCONN). A long-time member of the Project Management Institute (PMI) and IPMA-USA, Ken is a Certified Project Management Professional (PMP®) and a member of the PMI®-Honolulu and Philippines Chapters.

Ken has two 'KENBOOKS':

1. **Project Management PRAXIS** which includes many innovative project management tools & techniques; and describes a "Toolkit" of related templates, and
2. **MUSINGS on Project Management** -- a compilation of contemporary concerns in project planning, monitoring & evaluation, with some tools & techniques suggested for their solution.

Both books are available from Amazon, and on proof of purchase, their related templates are available – *for free* -- directly from Ken at kenfsmith@aol.com .



To view other works by Ken Smith, visit his author showcase in the Project Management World Journal (PMWJ) World Library at <https://pmworldlibrary.net/authors/dr-kenneth-smith/>