

*Beyond Technical:*

# *Cultivate Soft Skills to Build Loyalty with Your Customers*



**PT WORK** Force®





The power transmission/motion control (PT/MC) industry has its roots firmly in the technical arena. Your customers come to you for the knowledge you have about how to improve their processes, make them more efficient and add to their bottom line. But when you look at what keeps your customers happy, it's not always your technical expertise. Often, they'll tell you (and you tout in your value proposition) that it's the people assisting them and working for you that drive customer loyalty. You'll hear:

"We love working with Joe. Not only does he know our business, he really listens to our problems and offers a solution in words we can understand."

"Our problem was a mystery, but your team all worked together and came up with a creative solution."

"I felt bad calling Sue out to work on our issue over the weekend, but she insisted on helping us get back up and running."

These employees have all nailed the "soft skills"—the people-based competencies so needed in developing and fostering business relationships. While you can train for technical knowledge, the ability to work well with others is built in. By helping your employees improve on their soft skills, you can enhance what they already have to improve their relationships with customers and with each other.



## What exactly are soft skills?

Soft skills include people skills, communication skills, attitudes and character traits. These skills are not related to knowledge or specific education but are demonstrated behaviors to help people deal with situations.

## How do soft skills differ from hard skills?

Hard skills imply a specific knowledge: driving a forklift, how to set-up an Excel spreadsheet, how to assemble a gearbox, how to fix a motor, any technical ability, etc. These skills apply to the job itself and, in most cases, can be determined through testing or requiring a sample from the applicant. Hard skills, like being able to run a forklift, are teachable.

## How do I screen or test for soft skills?

Soft skills are often transferable across careers and industries. As these skills are more difficult to test for, you can ask behavior-based questions about past work experience during an interview to get a sense of someone's innate people-based skills.

Behavioral interview questions will tell you how people reacted in past situations they encountered in the workplace. They get to what they would do/have done in a real-life job, giving you a much clearer picture of what the candidate can bring to the table and how they would fit in your organization. Chances are they will react in a similar manner when the same "situation" occurs again. PT WORK Force has developed a [checklist](#) of behavioral questions you can ask potential candidates.



## Can soft skills be learned?

Most soft skills (like empathy for others and what they may be going through) are in a person's basic nature. In many cases, if they don't have it, they probably never will. But most people have some level of soft skills and need help in refining them. You can help employees improve their soft skills through modeling the behaviors you'd like them to exhibit, by creating mock scenarios and giving feedback (both positive and critical) in real time.

## What soft skills are important for PT/MC employees?

The number of soft skills easily number over 50. We've chosen five areas we consider to be most useful in the PT/MC industry. As an employer, you need to determine what soft skills are important in each position.

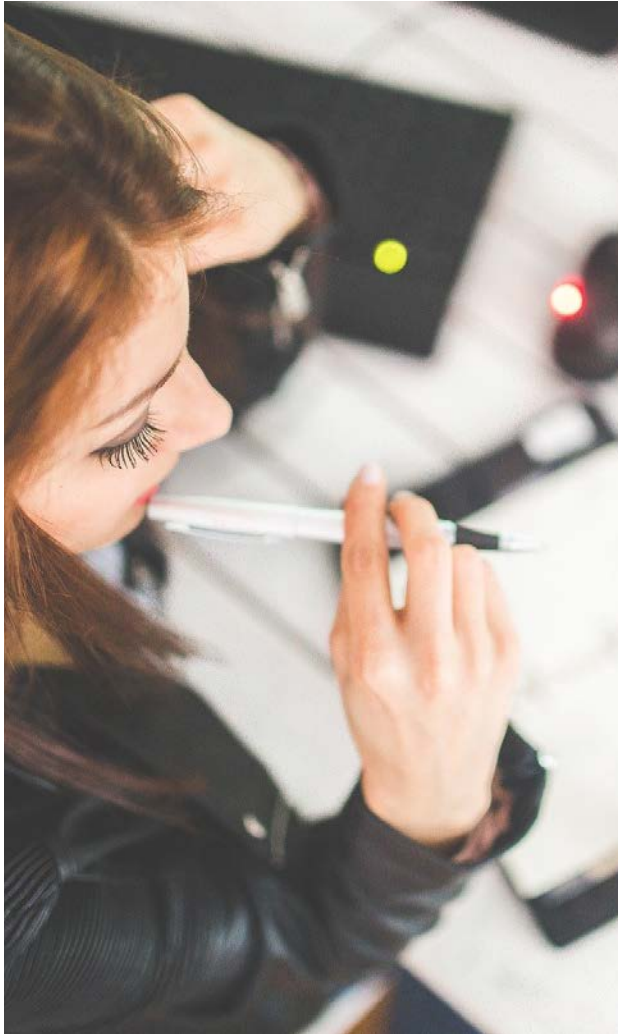
### Communication Skills

Whether written or verbal, in person or electronic, directly or indirectly, communication is the ability to be understood. Whether in the office, shop or out in the field, communicating in a way that people understand the information you are relaying will lead to fewer problems and faster service.

- **Active listening:** Hearing and understanding what is being said and asking questions, seeking clarification, etc. when not understanding. This is extremely important when listening to

customers explain their problem so you can find the right solution.

- **Negotiation:** Finding a mutually agreeable solution for all. Skillfully explain to the customer who wants service this afternoon that while the part needed is out of stock, it can be ordered and delivered tomorrow morning and then the tech will come out and install (so the customer feels good about the solution).
- **Conflict resolution:** Bringing together two opposing points of view to a mutually satisfactory conclusion. In the PT/MC industry, there will always be cases when two sides disagree. For example, the customer swears you told them the price for the part was \$35, but the true cost (which you stated) is \$65.
- **Writing:** Using language and punctuation in written form so the communication is readily understood by the recipient. With more communications being conducted by email, text, instant messaging, making yourself understood through writing is vital. No emojis, abbreviations (unless you are sure the recipient is aware), slang or creating acronyms by using the first letter in each word (e.g., WFH: work from home).



## Critical Thinking/Problem-solving

Solving problems with well thought-out solutions is what we do in the PT/MC industry. Breakdowns, missing parts and forgotten orders are just some of the daily situations that require some creative solutions and problem solving.

- **Accountability:** Owning the problem and finding a way to solve it. A customer calls and says he received a part he didn't order and did not receive the one he did order. The individual who received the customer's call "owns the problem," taking it upon themselves to check out all paperwork and deliver the right part to the customer.
- **Flexibility:** Doing what is needed to solve a problem or do a task, regardless of how it was done in the past. For example, your company has moved all accounting tasks from filing and keeping paper copies to computer entry and scanning needed documents. The person who held this job did it the same way for ten years, but willingly learns the new process.

- **Research:** Knowing when you do not have enough information to solve a problem and then knowing how to find the information you need. One of your good customers needs a part that is no longer being produced. In order to get the customer's machinery working again, a solution needs to be found either by finding a company that has the part or finding a way to provide the customer with a viable substitution.
- **Willingness to learn:** Growing your knowledge in new areas. An employee is being moved from the warehouse to counter sales. This person has never held any type of sales position but gladly accepts the transfer and does all she can (talk with people in sales, takes an online course, reads about selling, etc.) to learn how to do the best job possible.





## Leadership

Leadership is essential for those in a position of managing others. It's not about doing the work yourself but about guiding others to a decision or direction that leaves them feeling empowered.

- **Curiosity:** Wanting to know how things are done to better understand business processes and the skills needed to perform the process in order to find better ways to accomplish tasks. Being curious about how things “work” can lead to creative solutions to problems.
- **Empathy:** Understanding or feeling what someone else is experiencing; putting yourself in the other person's shoes. While this may be the most important characteristic a leader should have, it's also the most difficult. It requires understanding how another person feels, usually at a time that is not the best for them. An empathetic leader will acknowledge an employee's feelings and let them know you understand.

- **Learning from others:** Using the knowledge and experience of others to improve your knowledge. Leaders acknowledge they don't know everything and are not afraid to ask questions of others to learn more. As an example, a manager is not afraid to ask the inside salesperson what the expectations of a customer may be in regard to payment options.
- **Open-mindedness:** Willing to consider new ideas when tackling problems. These individuals are not wed to doing things as they have always been done. They also are less likely to have a preconceived opinion of both people and processes and are willing to accept out-of-the-box ideas. They don't assume that there is only one way to accomplish a task.



## Teamwork

Whether an employee works in the warehouse, office or outside sales, he or she is part of multiple teams at work and has to work effectively with other people. The success of a PT/MC company is dependent on the willingness of all employees to work together to serve your customers.

- **Organization:** Structuring work and time in a way that leads to efficiency and effectiveness. These are the people who can multi-task, working on several project or tasks because they can prioritize their work in a way that each task gets the attention it needs, when it needs it.
- **Optimism:** Exhibiting confidence about the future. This is the person who sees the glass as “half full” rather than “half empty.” Optimism can drive a team to work hard and longer to find a solution instead of giving up before exhausting all options.
- **Positive attitude:** Approaching challenges with an expectation of a successful outcome. Similar to optimism, a positive attitude, especially when things may not be going as planned, can bring about positive solutions to problems. Likewise, a bad attitude can bring about an ill-advised solution.
- **Flexibility:** Adjusting for unexpected problems or challenges. Things break, people call in sick at the last minute, plans change, rush orders come in. So being able to “roll with the punches” while keeping a cool head is crucial.



## Work Ethic

We can train people in hard skills (like driving a forklift), but those with work ethic want to learn those skills to make them better at their job. These are the people that stay late or come in early to help a customer.

- **Attention to detail:** Accomplish tasks thoroughly and accurately. This skill is needed when the outcome needs to be as close to perfect as possible. Someone in your accounts receivable department needs to be able to be accurate when tracking payments received.
- **Integrity:** Having strong moral principles and honest in all issues. An individual with integrity will make sure parts are all produced the same without any discrepancy. To borrow a quote from the Disney movie Frozen, integrity is "doing the next right thing."
- **Persistence:** Continuing a course of action despite difficulty or opposition. An individual who is persistent will not give up when a roadblock is met but will figure out a way to complete the task.
- **Time management:** Organizing time efficiently and effectively to complete assigned tasks. These are the people who can be given multiple projects/tasks, and they complete them effectively. Organized team members can keep projects on track.



**PT WORK Force**<sup>®</sup>

## About the *PTDA Foundation*

As the charitable arm of the Power Transmission Distributors Association, The PTDA Foundation champions education, outreach, and research initiatives relevant to the power transmission/ motion control (PT/MC) industry that enhance the knowledge, professionalism and productivity of industry stakeholders.

PT Work Force is a key initiative of the PTDA Foundation that is developing resources to help PT/MC companies attract, hire, on-board, train, manage and retain employees. The PT WORK Force can be reached at [ptda.org](http://ptda.org)

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