

PREVIEW

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*But I Don't
Have Customers
Leader's Guide*

INTRODUCTION

About this Program

In today's workplace, we emphasize treating customers with respect and meeting their needs. But we often overlook how we treat our internal customers. How we treat each other in the workplace can either help or hinder the productivity and profit of our organization.

This program, *But I Don't Have Customers*, will help your employees learn to value each other, which results in increased performance throughout your entire organization. The program is of value to any employee, because each employee has customers.

This Leader's Guide is designed to help you conduct a thorough training session on *But I Don't Have Customers*. It permits you to use this program in many different ways, giving you the flexibility to determine which training format is best for your organization's needs. The program is 21 minutes long and can be stopped easily for discussion of important points. On the DVD, there is an option to show the program in scenes.

A PowerPoint® presentation is provided to assist you in the presentation of this material. As an alternative, the slide information may be printed or transferred to transparency sheets or a flipchart when used in conjunction with the program. The participant workbook *Outstanding Customer Service: The Key to Customer Loyalty* is designed to enhance the program.

We recommend that you tailor the program to your organization's needs by including specific information unique to your employees. The specifics of how you facilitate this course are determined by you.

Training Materials

There are a few things you'll need for an effective training session:

- A training room located away from major distractions or interruptions.
- A comfortable arrangement of chairs with an opening for a TV monitor or projection screen and other visual aids. (Be certain all participants can see the screen and each other).
- Adequate lighting that can be adjusted while viewing the program.
- A location, possibly including a podium, from which the trainer/speaker can lead discussion and a flipchart.
- The training program *But I Don't Have Customers*.
- TV and VCR or DVD player/computer with projector and remote.
- Copies of the class agenda (see page 4).
- The workbook, *Outstanding Customer Service: The Key to Customer Loyalty*
- Paper and pencil for each participant.
- A flipchart or dry-erase board and appropriate markers.
- A computer with PowerPoint® software and the PowerPoint® Presentation.
- Copies of the Post-Test and Evaluation (see pages 25 & 27).

Preparation

Preparation is the key to effective training. Do these things prior to the session:

Establish Objectives

Determine the training objectives in advance so that you can identify the approach to take for the training session. It is also important to decide what level of understanding is expected from participants upon completion of the training. Suggested training objectives for this presentation are to learn how to:

- Identify your customers
- Improve your service skills
- Discover the customer's needs
- Agree on a plan of service
- Exceed the customer's expectations.

Feel free to edit the training objectives to meet the particular needs of your organization. Training objectives should reflect the content of the program.

Determine the Audience

Another aspect to consider in planning this training session is the audience. Tailor your presentation to the skills or experience of the participants. The focus of your discussion and the depth of content presented may vary, depending on whether you are providing an orientation for new employees or a refresher course for all employees.

The training group size should range from 10 to 20 people. Most of the exercises in this program require that the group break into two smaller groups in order to increase participation. When the group is too large, individual attention may be lost.

Agenda

Two session agendas have been provided to help guide you through your *But I Don't Have Customers* session. You may modify these agendas to meet the needs of your participants.

I-Hour Session

Activity	Time
Introduction	10 minutes
Show and Review Program in Scenes and Discuss	40 minutes
Session Summary	10 minutes

3-Hour Session

Activity	Time
Introduction	15 minutes
Exercise 1: Who Are Your Internal Customers?	15 minutes
Show Program and Review	25 minutes
Break	10 minutes
Exercise 2: Critical Contact Points	15 minutes
Exercise 4: What's Your Style?	20 minutes
Exercise 5: Dealing with Anger	20 minutes
Break	10 minutes
Exercise 6: "Yes, I Can"	15 minutes
Exercise 7: Creating an Action Plan	10 minutes
Post-Test	15 minutes
Session Summary	10 minutes

Invite Participants

Send out letters or memos to participants or post a notice two weeks in advance of the training date. (Sample included on page 5.) State the location, date and time, and meeting agenda. Administer the Pre-Test in advance.

Sample of Invitation Memo

Date: June 10, 20__

To: All Managers

From: Janice Bax, Human Resources Manager

Re: *But I Don't Have Customers*

You are invited to attend a training session on internal customer service and its importance to an organization. As an employee of our organization, it is a vital part of your job to provide outstanding customer service. This goes beyond serving external customers. It also includes your co-workers, colleagues and managers, the internal customers of the organization.

A few goals of the training session are to learn how to:

- Identify your customers
- Improve your service skills
- Discover the customer's needs
- Agree on a plan of service
- Exceed the customer's expectations.

To help us get the most out of our training session, please take the time to complete the enclosed Pre-Test and return it to me by (insert date). Your honest response to these questions will help us place emphasis on critical areas.

Please plan to be at the training session on June 20 at 2:00 p.m. We will be meeting in the main conference room for a 1 hour session. If you are unable to attend, please contact me at 555-8890 as soon as possible.

Agenda:

Introduction	2:00-2:10
DVD & Discussion	2:10-2:50
Session Summary	2:50-3:00

We look forward to seeing you on Thursday, June 20.

Presentation Tips

Overcoming anxiety

The best way to overcome anxiety about speaking before a group is to be prepared. Although it is natural to be nervous, your sweaty palms will disappear once you focus on what you are saying. Concentrate on communicating your message and your presentation will flow naturally.

Choosing your vocabulary

It's best to use the same comfortable language that you would use when speaking one-on-one. Avoid jargon and overly complicated words or phrases.

Getting rid of the “umms”

One of the most annoying mistakes a speaker makes is saying “umm” every time there is a break between thoughts. Remain silent while you think about what you're going to say next. The silence will seem longer to you than it will to the audience. If you remember this, you'll feel less pressure to fill the silence. You can control your “umms” by jotting down notes beforehand. If you want to include personal anecdotes or examples, write down a few notes to trigger your memory. Beware of writing down too much, however. You'll deliver your message to your note cards instead of your audience.

Controlling the speed and tone of your voice

You'll put your audience to sleep if you speak too slowly, and they won't be able to keep up with the content if you speak too quickly. Approximately 150 words per minute is the best speed (that's about two thirds of a page, typed, double-spaced). Vary your tone often, especially when making an important point. Adding emotion to your presentation will keep your audience involved. Again, strive for a conversational tone.

Sticking to the schedule

Begin class on time and restart the session promptly at the end of the break. Except for emergencies, participants should not be interrupted for messages.

Asking for questions

Ask for questions throughout the session. Be prepared to answer all types of questions, but don't be worried you don't know every answer. You can simply say, “Let me find out for you and get back to you.” Keep in mind many questions are best answered through discussion. An appropriate response might be, “Good question. Let's hear some discussion on that one.” Watch the clock, though. Too many unplanned discussions can eat up your time.

TRAINING SESSION OVERVIEW

Giving The Pre-Test

It is recommended that you give the Pre-Test prior to the training session. That way, you will have an opportunity before the session begins to review participants' answers and get an idea of what they already know. Otherwise, administer the Pre-Test at the start of the session so you can review participants' responses while they are watching the program.

Presentation Outline

Open the session. Welcome the participants and introduce yourself to the group. Give a brief explanation of the purpose of the session and quickly review the agenda. Consider asking participants:

- How do you define customer service?
- Why is internal customer service important?
- What are the challenges you face in trying to offer excellent customer service?
- How does your handling of internal customers impact outside customers?

Have participants introduce themselves and state the department or area in which they work. You may want to use an "icebreaker" to get the class warmed up for group discussion and to get to know each other.

Distribute and review copies of the training objectives for this session. Be sure participants understand what you expect them to learn and what skills they need to display as a result of this training. Knowing what is expected in advance better prepares the employees and helps them to participate successfully.

Objectives for this training session are to learn how to:

- Identify your customers
- Improve your service skills
- Discover the customer's needs
- Agree on a plan of service
- Exceed the customer's expectations.

Start the program. To avoid unpleasant surprises, it's a good idea to pre-set the volume of your monitor before the training session begins. Doing so avoids startling participants if the sound is too loud or frustrating the participants with missed information because the sound is too low.

Discussion Guides

Three discussion guides have been developed for this program. “Discussion Questions” allows for a dialogue of thoughts and ideas. “Scene-Specific Discussion Guide” is designed to be used if you choose to view the program in scenes and discuss as you go. “Discussion Topics” is designed to be used after watching the program in its entirety. After determining the best approach for your training group, start the program.

Training Points are included on the DVD format of this program to provide visual aids when sharing important training material, or reviewing content of the program. Video links are included to provide visual reinforcement of some of the training points.

A PowerPoint® presentation, identical to the Training Points content of this program, has been included in both formats for your use. The customizable version is available for you to add specific information for your facility. Tips for customizing this presentation are included on pages 30-31.

Discussion Questions

After viewing the program in its entirety, discuss the following questions:

- At the start of the program, did Charlie’s customer have a right to be upset with the service she was getting?
- How did Charlie treat his internal customers differently from his external customers?
- What examples of poor customer service were shown in the program?
- What did the program communicate in regard to internal customers within your own department?
- In the end, what were some of the things that Charlie and his team did to improve customer service?
- What specific elements in the program can be applied to improve customer service in our organization? How?

Scene-Specific Discussion Guide

The seven scenes in this program provide an opportunity to discuss the concepts of internal customer service. This guide is broken down with a summary of each scene, offering discussion questions for each portion of the program. Slides may be accessed in either the Training Points section of the DVD or the PowerPoint® presentation.

Introduction

In this segment, participants meet Charlie, a programmer who didn’t think he had internal customers. Participants also view mediocre customer service skills displayed by other members of the programming department. Reality strikes when the team hears that authorization has been granted to allow outsourcing of programming needs not met by the department. Use Slide 2 to review the training objectives for this program.

Identify Your Customers

In this scene, the programming department is seen discussing the predicament they have found themselves in. They entertain the idea that the employees they create programs for are actually customers. And, they discuss the importance of understanding the customers needs. At the end of the scene, a series of questions are provided to facilitate a group discussion designed to identify internal customers. The questions are:

- Who depends on the work you do?
- Who does your work affect?
- What is done with the work you complete?
- Why is the work you do important?
- Who are your customers?

Slide 3 contains these questions. Create and post a list of the participants' internal customers.

Improve Your Service Skills

During this scene, Charlie is thinking about the feedback he has received about the departments ability to meet their customers' needs. He observes the skills of his co-workers. The scene concludes with him calling a meeting and reviewing the skills he found necessary to become the programmers of choice. Use this scene as an opportunity to review the essentials of customer service, regardless of whether the customer is internal or external. At the end of this scene a question is displayed. Ask participants to arrive at a consensus and select their response for each item. If the answer is incorrect, a portion of the program will play to reinforce content. Slide 4 may be used as an outline.

Discover the Customer's Needs

Participants will observe Charlie probing for Bernice's needs during this scene. Note his statement "As I asked questions and really listened, I realized how much I had missed. I began to understand what Bernice really wanted from me." Use this statement to launch a brainstorming session of the types of questions to ask to determine internal customers' needs. At the end of this scene a question is displayed. Ask participants to arrive at a consensus and select their response. If the answer is incorrect, a portion of the program will play to reinforce content. Participants may try again. Slide 5 may be used to review the steps in assessing a customer's needs.

Agree on a Plan of Service

During this scene the programming department realizes that their customer's dissatisfaction is not Charlie's problem, but everyone's problem. Together they agree on a plan of service. At the end of this scene a question is displayed. Ask participants to arrive at a consensus and select their response. If the answer is incorrect, participants may try again. Use Slide 6 to review the guidelines for coming up with a plan for better serving internal customers.

Exceed the Customer's Expectations

Participants view customer expectations being exceeded several times during this scene. At the end of this scene a question "How will you exceed your customer's expectations?" is offered for group discussion. Review the importance of "going above and beyond" by displaying and discussing the answer or using Slide 7 (both are the same).

Summary

Using Slide 8, review the key concepts covered during this program.

Discussion Topics

Follow the program with a discussion. Discuss the following highlights using the Training Points or PowerPoint® presentation to support your discussion.

1. Program Objectives

Use Slide 2 to review the overall training objectives for this session.

2. Identify Your Customers

Slide 3 may be used to help participants identify who their internal customers are. Ask participants:

- Who depends on the work you do?
- Who does your work affect?
- What is done with the work you complete?
- Why is the work you do important?
- Who are your customers?

Create and post a list of internal customers.

3. Improve Your Service Skills

Using Slide 4, discuss the key steps to satisfying any customer. Ask participants:

- How do you maintain a positive attitude?
- What can you do to put the customer first?

4. Discover the Customer's Needs

Slide 5 may be used as a reminder of the three steps to discovering a customer's needs. Ask participants:

- What questions would you use to discover your customer's needs?
- How can you clarify your understanding of the customer's needs?

5. Agree on a Plan of Service

Using Slide 6, facilitate a discussion about the value of agreeing on a plan of service when it takes more than one person to meet a customer's needs.

6. Exceed the Customer's Expectations

Use Slide 7 to review ways to exceed a customer's expectations. Ask participants:

- How can you exceed your customer's expectations?
- How can you enhance the service you provide?
- What ideas do you have for surprising your customers?

7. Summary

Using Slide 8 as a guide, summarize the key concepts covered during the program.

EXERCISES

Exercise 1: Who Are Your Internal Customers?

Time: 15 minutes

Materials Needed: *Outstanding Customer Service: The Key to Customer Loyalty* participant workbook

Objective: To create a better understanding of the connection between internal and external customers.

1. Read or paraphrase the following:
We need to understand who our customers are. Most of the time we only think of customers as being external people who purchase or use the goods or services our company provides. Taking a look at our internal customers has a direct impact on our external customers.
2. Ask participants to turn to page 11 of the book *Outstanding Customer Service: The Key to Customer Loyalty*.
3. Have participants read page 11 and complete the *Take a Moment* exercise on page 13.
4. Have participants share their answers with the group.
5. Read or paraphrase:
On the Pre-Test, you listed as many of your internal customers as possible. Based on what you have read in the book, review and revise your list. This may include adding individuals you had not considered before.

Exercise 2: Critical Contact Points

Time: 15 minutes

Materials Needed: Worksheet 1: *Critical Contact Points*

Objective: To identify Critical Contact Points and review when and how they were successful and unsuccessful.

1. Read or paraphrase the following:
An important component for improving internal customer service is identifying Critical Contact Points. These are moments of interaction that leave lasting impressions in the minds of your internal customers concerning your perceived level of customer service. In short, they are points where your internal customers are depending on you for information or action.
2. Distribute a copy of *Worksheet 1: Critical Contact Points* to each participant. In the space provided, have them list the Critical Contact Points they've had with their top-priority internal customer during the past two weeks.
3. Ask the participants to rate each contact point as either "successful" or "needs improvement" and make notes in the space provided to explain their reasoning.
4. Have participants volunteer examples of Critical Contact Points that were successful and explain why they were.
5. Have participants volunteer examples of Critical Contact Points that were not successful and explain why they may not have been. It may be helpful to offer an example from your

own experience before asking the class to respond. By showing that you have made mistakes, you can help participants be more comfortable describing theirs.

6. Read or paraphrase the following to the group:
The best way to ensure that your Critical Contact Points are successful is to be a professional. This means using the right tone of voice, using attentive body language, really listening to what the customer has to say, avoiding the use of jargon, and being prepared to offer alternative solutions. Again, it's important to put yourself in your internal customers' shoes and look at these moments of contact from their perspective.

Exercise 3: Improving Your Service

Time: 5 minutes

Materials Needed: Worksheet 2: *Improving Your Service*

Objective: Introduce a worksheet to be used with a customer to target areas for customer service improvement.

1. Read or paraphrase the following to the group:
Another step in improving internal customer service is to ask the customer how you can improve. This isn't always easy, because it leaves you open to criticism and a bruised ego. But in making the effort, you demonstrate to customers that you value their opinions. You also set yourself apart as someone who cares—someone who is making the effort to offer internal customer service excellence. More importantly, you may learn to do your job better.
Remember, your internal customers are entitled to all the rights and privileges of an outside customer, but they are also your partners. As such, the two of you have a responsibility to reach mutually profitable decisions for the company and the outside customer.
2. Ask and discuss the following questions:
 - Why is it important to ask your internal customers how you can improve your services?
 - What feedback do you expect to hear from your customers?
 - What is the difference between an external customer and an internal customer?
3. Distribute Worksheet 2: *Improving Your Service* to each participant.
4. The first part of the exercise (the only part done in the classroom), has participants rate (on a scale of 1–10, 1 being low and 10 being high) the level of service they provide one of their most important internal customers.
For the second part of the exercise, each participant will contact that customer and have him or her answer the listed questions and then rate the level of service he or she is receiving from them. Participants should ask about areas to target for improvement.

Exercise 4: What's Your Style?

Time: 20 minutes

Materials Needed: *Outstanding Customer Service: The Key to Customer Loyalty* participant workbook

Objective: To recognize different conflict styles.

1. Read or paraphrase the following to the group:
Whenever people are dealing with one another, conflicts may occur. It is important to realize that one of the best ways to deal with conflicts is to understand that everyone handles conflict situations differently.
2. Ask participants to read pages 75–77 of *Outstanding Customer Service: The Key to Customer Loyalty* and complete the “Take a Moment” exercise on pages 78.
3. Have participants share their answers with the group.
4. Read or paraphrase the following to the group:
Next time you are in a conflict situation with an internal customer, see if you can determine that person’s conflict style. Once you have determined which style your customer is using, you will be able to adapt your style to better deal with the conflict. Conflicts can sometimes escalate and anger can set in. In our next exercise, we will take a look at dealing with anger.


Exercise 5: Dealing with Anger

Time: 20 minutes

Materials Needed: Worksheet 3: *Dealing with Anger*

Objective: Determine and discuss the guidelines for dealing with angry internal customers.

1. Read or paraphrase the following to the group:
Would someone give an example of a situation in which you had to deal with a co-worker who was angry with you about a work-related problem? How was the situation resolved?
2. Elicit only three or four examples. For each example, have the participant explain what he or she did to resolve the situation. Don’t let this discussion become a “let’s embarrass or put down a particular person or department” session. Keep the discussion focused on the facts. You may want to share an example of your own.
3. Read or paraphrase the following to the group and discuss the question:
As organizations continue to change and workers strive to meet higher expectations, we see an increase in stress, personality conflicts, and communication difficulties. Often the internal customer relationship begins to suffer. What may start as a small, legitimate request that should take only one conversation may escalate to an explosive confrontation if the individuals involved have been overworked, have fallen behind on deadlines, or are having a “bad day.”
Based on your personal experience, what’s the biggest challenge you have in dealing with an angry internal customer?
4. Divide the class into small discussion groups of three to four people.
5. Distribute Worksheet 3: *Dealing with Anger* to each participant.

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6. Read the scenario aloud from *Worksheet 3: Dealing with Anger* to everyone in the session.
It's a Friday afternoon. You've just returned from lunch. You listen to your voice mail and hear an angry-sounding message from Carlos. He has a problem that needs to be solved ASAP and requests that you call him immediately. You don't know what the problem is, but you know Carlos has a reputation for being demanding, intimidating and quick to explode. When responding to Carlos, your objective should be to help him develop a better understanding of the situation and get his agreement on a course of action (on the phone or preferably in person).
7. Give the following instructions to the entire group.
In your small groups, discuss and list all of the general guidelines you would follow to get Carlos to develop a much better understanding of the situation and get agreement on a course of action (on the phone or preferably in person).
8. Allow the small groups 5–8 minutes to compile a list.
9. Invite each group to read its list out loud. Compare similarities in group lists as well those actions that are unique to the group(s).
10. Read or paraphrase the following to the group:
The key to dealing successfully with a hostile internal customer is to ask questions and listen in a caring way. If you allow yourself to become angry or frustrated, you'll only add fuel to the fire. You should let the internal customer explain his or her position without interruption. Acknowledge that you're listening and empathetic with an occasional "I see," or "I understand." Don't make excuses or blame others. Simply acknowledge that a problem exists and, with input, outline a suggested course of action and ask for agreement. Remember, the hostile customer is often so confused and consumed by anger that he or she has lost sight of the original goal. By caring, asking, and listening, you can help rediscover that goal, and together you can chart a path to achieve it.

Exercise 6: "Yes, I Can"

Time: 15 minutes

Materials Needed: Worksheet 4: "Yes, I Can"

Objective: To change "I can't" vocabulary to "I can" when possible, or to offer alternative solutions to the internal customer.

1. Have participants choose a partner for this exercise.
2. Distribute a copy of *Worksheet 4: "Yes, I Can"* to each pair.
3. Ask participants to rephrase the statements on the worksheet by changing them from "I can't" to "I can."
4. Allow the pairs 5–8 minutes to complete the worksheet.

5. Discuss the various answers to each question. Possible answers are listed below.
- I can't get that until Thursday.—I can get that on Thursday.
 - I can't give out that kind of information.—I can request that information for you.
 - I can't help you with your question. You'll have to talk with the person in charge of that department.—I can put you in contact with the person in charge of that department. She will answer your questions.
 - I can't put your call through.—May I put you on hold, connect you with his/her voice mail, or would you prefer if I took a message and had him/her call you back?
 - I can't give out office supplies.—I can show you how to get office supplies.
 - I can't order that part without approval.—I can order that part when I get approval.
 - I can't check on that because it's after 5:00 PM.—I can check on that as soon as I come in tomorrow morning.
 - I can't find the invoice on my computer.—I can call you back with the invoice.
6. Read or paraphrase the following to the group:
You can't say "yes" to every request. However, you can offer alternatives and options to help your internal customers. This not only generates solutions but also presents a positive attitude and builds relationships.

Exercise 7: Creating an Action Plan

Time: 10 minutes

Materials Needed: Worksheet 5: *Creating an Action Plan*

Objective: To create an action plan for dealing with internal customers.

1. Read or paraphrase:
To close our training session, we're going to create an action plan for dealing with internal customers. By being more aware of who our internal customers are, what to do when we have a Critical Contact Point with them, what their expectations are related to service, and how best to serve their needs, we can provide consistent quality customer service to everyone.
2. Distribute a copy of *Worksheet 5: Creating an Action Plan* to each participant.
3. Give each participant about 5 minutes to complete the worksheet.
4. When all participants are finished, read or paraphrase the following to the group:
Now that you've taken the time to create this action plan, use it! Customer service is critical to this organization's success. How we treat each other has a direct impact on our external customers. If we consistently treat our colleagues, co-workers, and peers with respect, it will make a difference on how we approach our job, our day, and our future.

SESSION SUMMARY

Summarize

One summarizing technique is to review the course objectives with the class. Another is to ask each participant to highlight what was learned from the training session. Ask the participants if they have any final questions.

Today you had the opportunity to learn how to do the following:

- Identify your customers
- Improve your service skills
- Discover the customer's needs
- Agree on a plan of service
- Exceed the customer's expectations.

Administer the Post-Test

Distribute copies of the Post-Test (located on page 25) to each participant. An answer key is provided on page 26. You may wish to customize the Post-Test to fit your organizational objectives. The Post-Test is an excellent tool for determining how much each participant learned during the session.

Evaluate

Distribute the evaluation form (located on page 27) to participants when they have finished answering the questions on the Post-Test. When each participant returns the evaluation form to you, thank him or her for attending the session.

WORKSHEET 1

Critical Contact Points

Instructions: List the Critical Contact Points you have had with your top-priority internal customer during the past two weeks. Then indicate whether the point was a success or needs improvement. Explain your reasoning in the space provided.

Contact Points	Success	Needs Improvement
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1.	<input type="checkbox"/>	<input type="checkbox"/>
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2.	<input type="checkbox"/>	<input type="checkbox"/>
----	--------------------------	--------------------------

3.	<input type="checkbox"/>	<input type="checkbox"/>
----	--------------------------	--------------------------

4.	<input type="checkbox"/>	<input type="checkbox"/>
----	--------------------------	--------------------------

5.	<input type="checkbox"/>	<input type="checkbox"/>
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WORKSHEET 2

Improving Your Service

Instructions: On a scale of 1–10 (1 being low and 10 being high), rate the level of service you provide your most important internal customer.

In the near future, contact this customer and have him or her answer the questions below to help you target areas to improve. Once your customer has answered the questions, ask him or her to rate your overall internal customer service on the same scale as noted above.

My Rating (on a scale of 1–10): _____

1. What service or product do you need from me in order to do your job well?
2. Why do you depend on me to provide this product or service?
3. What am I not adequately providing you related to customer service?
4. In your opinion, what areas in customer service should I concentrate on?
5. Am I providing anything to you that you no longer need?
6. Any additional comments?

Customer Rating (on a scale of 1–10): _____

WORKSHEET 3

Dealing with Anger

Instructions: As a group, list all of the general guidelines you can follow to ensure that you achieve your objective, which is to get Carlos to agree to your suggested course of action.

It's a Friday afternoon. You've just returned from lunch. You listen to your voice mail and hear an angry sounding message from Carlos.

He has a problem that needs to be solved **ASAP** and requests that you call him immediately.

You don't know what the problem is, but you know Carlos has a reputation for being demanding, intimidating, and quick to explode.

When responding to Carlos, your objective should be to help him develop a better understanding of the situation and get his agreement on a course of action (on the phone or preferably in person).

WORKSHEET 4

"Yes, I Can"

Instructions: Read each statement, and change it from an "I can't" statement to an "I can" statement.

1. I can't get that until Thursday.
2. I can't give out that kind of information.
3. I can't help you with your question. You'll have to talk with the person in charge of that department.
4. I can't put your call through.
5. I can't give out office supplies.
6. I can't order that part without approval.
7. I can't check on that—it's after 5:00 PM.
8. I can't find the invoice on my computer.

WORKSHEET 5

Creating an Action Plan

Instructions: Write a brief response to the following statements. These responses will form the basis for creating an action plan to work more effectively with your internal customers.

1. With the course *But I Don't Have Customers* in mind, think about how you currently deal with internal customers. List those things that you feel are your strengths.
2. Think about what you dislike about your ability to handle internal customers. Based on the class and the discussions, list those areas that you feel need improvement.
3. List the steps you will take to improve your internal customer service skills.
4. How will you know when you have improved?

PRE-TEST

Instructions: Read each question and indicate your answers in the space provided. Be prepared to discuss your answers at the training session. This survey is a learning exercise only and not a test. Please return it to the trainer prior to the training session for his or her preparation for the class.

1. When co-workers are angry, I _____ I can work with them in a way that allows them to express their emotion, and then together we can move towards resolving the issue.
 - a. Am not at all confident
 - b. Am not confident
 - c. Have no feeling either way
 - d. Am confident
 - e. Am very confident

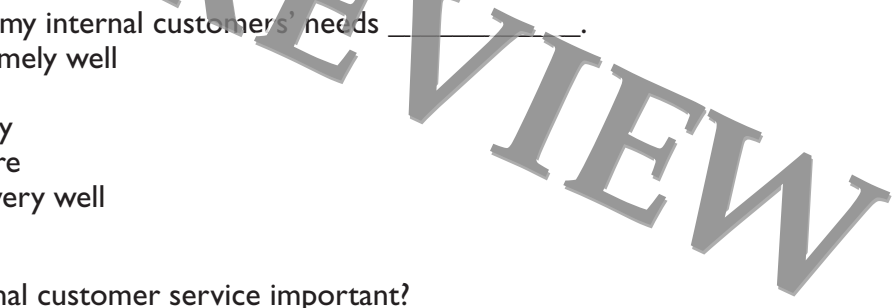
2. When asked for help by a co-worker, I view it as a special opportunity to serve our customers.
 - a. Never
 - b. Rarely
 - c. Sometimes
 - d. Often
 - e. Very often

3. When a co-worker is angry, I feel that he or she is mad at me personally.
 - a. Never
 - b. Rarely
 - c. Sometimes
 - d. Often
 - e. Very often

4. Define internal customer service.

5. Please list as many of your internal customers as you can.

PRE-TEST continued

- 
6. I feel I know my internal customers' needs _____.
 - a. Extremely well
 - b. Well
 - c. Mostly
 - d. Unsure
 - e. Not very well

 7. Why is internal customer service important?

 8. What are some challenges you face in trying to offer excellent customer service?

 9. How does your handling of internal customers impact outside customers?

 10. List your guidelines for dealing effectively with an angry customer.

PRE-TEST ANSWER KEY

1. When co-workers are angry, I _____ I can work with them in a way that allows them to express their emotion, and then together we can move towards resolving the issue.
- Am not at all confident
 - Am not confident
 - Have no feeling either way
 - Am confident
 - Am very confident

Answers will vary.

2. When asked for help by a co-worker, I view it as a special opportunity to serve our customers.
- Never
 - Rarely
 - Sometimes
 - Often
 - Very often

Answers will vary

3. When a co-worker is angry, I feel that he or she is mad at me personally.
- Never
 - Rarely
 - Sometimes
 - Often
 - Very often

Answers will vary.

4. Define internal customer service.
Serving the needs of those within your organization who depend on the work you do to do their jobs.

5. Please list as many of your internal customers as you can.

Answers will vary.

6. I feel I know my internal customers' needs _____.
- Extremely well
 - Well
 - Mostly
 - Unsure
 - Not very well

Answers will vary.

7. Why is internal customer service important?
When the needs of internal customers are met, everyone is better prepared to meet the needs of external customers.

8. What are some challenges you face in trying to offer excellent customer service?
Answers will vary.

9. How does your handling of internal customers impact outside customers?
Answers will vary.

10. List your guidelines for dealing effectively with an angry customer.
Identify the problem; ask questions; show you're listening; keep your word; learn to stay calm and avoid blaming other employees. Suggest a solution and ask for agreement.

POST-TEST

Instructions: Answer the questions listed below, which deal with *But I Don't Have Customers*.

1. What is your definition of internal customer service?
2. Why is internal customer service important?
3. How does your handling of internal customers impact the outside customer?
4. List the guidelines for dealing effectively with an angry internal customer.
5. List elements that comprise positive behavior.
6. Define Critical Contact Points.
7. List your internal customers.
8. What are two ways to determine the needs of your internal customers?
9. Describe the criteria for dealing with an angry internal customer.

POST-TEST ANSWER KEY

1. What is your definition of internal customer service?
Internal customer service means treating your internal customers as well as you external customers.
2. Why is internal customer service important?
It has a positive effect on the external customer.
3. How does your handling of internal customers impact the outside customer?
Answers will vary.
4. List the guidelines for dealing effectively with an angry internal customer.
Identify the problem; ask questions, show you're listening, and keep your word; learn to stay calm and avoid blaming other employees; suggest a solution and ask for agreement.
5. List elements that comprise positive behavior.
Offer alternative solutions; try to say "I can" instead of "I can't."
6. Define Critical Contact Points.
Points where your internal customers are depending on you for information or action.
7. List your internal customers.
Answers will vary.
8. What are two ways to determine the needs of your internal customers?
Ask the customer how you can improve, listen to the customer, and keep your word.
9. Describe the criteria for dealing with an angry internal customer.
Get background information; be calm with a positive, caring attitude; let the customer vent; ask and listen; paraphrase as a form of feedback; develop a plan for action; ask for acceptance; and set measurable action steps.

COURSE EVALUATION

PREVIEW

Please circle your rating for each statement.

Your input is IMPORTANT in helping us evaluate and improve our training programs. Thank you for taking time to think about and respond to the following questions.

Course: _____ Date: _____ Facilitator: _____

About the Course

- 1. Were the objectives of the course clearly stated? ___ YES ___ NO
- 2. How well were the objectives met by the course? Were not met | 2 3 4 5 Were met very well
- 3. How applicable will this training be to your job?
 ___ Almost none of the material will be applicable to my job.
 ___ Some will be applicable, but some was confusing or irrelevant.
 ___ Absolutely applicable! I look forward to seeing results soon!
- 4. Was the information presented in a logical and understandable order?
 ___ Didn't seem logical at all.
 ___ Some was, some wasn't.
 ___ Yes, all of it seemed logical and understandable.
- 5. How useful were the discussions and the exercise(s) in helping you learn the information?
 ___ Not useful at all ___ Somewhat useful ___ Very useful
- 6. To what extent did this training meet your expectations?
 ___ DID NOT meet my expectations ___ MET expectations ___ EXCEEDED expectations
- 7. What would you add or change to improve this course?

About the Facilitator

- 8. Was the facilitator positive and professional? ___ Very much so ___ Could improve
- 9. How well was the facilitator prepared and able to explain the information?
 NOT well prepared | 2 3 4 5 VERY well prepared
- 10. Did the facilitator create an atmosphere that encouraged questions and learning?
 ___ Yes ___ No – Facilitator should have: _____
- 11. Did the facilitator explain the material in ways that made it applicable to your job?
 ___ Very much so ___ Sometimes ___ Almost none was connected to my job

Your comments on the facilitator: _____

TRAINING POINTS AND POWERPOINT® OVERVIEW

PREVIEW



Slide 1



Slide 2



Slide 3



Slide 4

TRAINING POINTS AND POWERPOINT® OVERVIEW Continued

PREVIEW

Slide 5




Discover the Customer's Needs

- Ask questions.
- Listen carefully.
- Clarify your understanding.

◀ 5 ▶
main menu

Slide 6



Agree on a Plan of Service

- Treat co-workers as customers.
- Seek agreement before making commitments.
- Set a timeline.
- Keep your agreements.
- Meet deadlines.
- Show you care.

◀ 6 ▶
main menu
video link

Slide 7



Exceed the Customer's Expectations

- Be flexible.
- Consider alternatives.
- Offer enhancements.
- Follow through on service delivered.
- Surprise the customer.

◀ 7 ▶
main menu
video link

Slide 8



Summary

- Ask questions.
- Listen.
- Keep commitments.
- Give internal customers equal priority.
- Recognize internal service impacts external service.
- Maintain a positive attitude.
- Treat all customers with care and respect.

◀ 8 ▶
main menu

CUSTOMIZING A POWERPOINT PRESENTATION

The PowerPoint® presentations included on the Coastal DVD and CD products are customizable when used on a computer loaded with Microsoft PowerPoint® software. (Note: In the following instructions, “click” implies a click with your left mouse button. If a “right” click is necessary, it will be so indicated.) Microsoft PowerPoint® has many features.

The following steps will help you customize our presentations quickly. To customize a presentation:

1. If the “Customizable Version” icon is displayed on the landing screen, click on this option. If this option is not available, click on the PowerPoint® presentation to open it. Save this presentation to another location, such as your hard drive or a folder on the network. You will make your customizations on the saved version.

To add, copy, hide or remove a slide, or to change the order of the slides in the presentation:

2. Click on “View” on the menu bar.
3. Click on “Slide Sorter” from the “View” menu. Or, under the “Normal” view, you may use the “Outline” on the left side of the screen.
4. To add a slide, place your cursor in front of the slide where you want to add a slide. Click on “Insert” on the menu bar. Then, click on “New Slide” on the “Insert” menu. Or, click on the “New Slide” tool on the tool bar. Choose a slide format to fit your desired content, and follow the prompts given.
5. Sometimes it’s easier to copy a slide, and then change the content of the slide than to create a new one. To copy a slide, click on the original slide. Click on “Edit” on the menu bar, and choose “Duplicate.” A new copy will be created to the right of the original slide. Or, click on “Edit” on your menu bar, and choose “Copy.” You may then “Paste” the slide wherever you want it to appear.
6. To hide a slide from your presentation, but to keep it for future use, right click on the slide you wish to hide, and choose “Hide Slide” from the menu. Or, click on the “Hide Slide” tool on the tool bar.
7. To remove a slide from the presentation, click on the slide you want to remove. Click on “Edit” on the menu bar. Then, click on “Delete Slide” on the “Edit” menu. Or, click on the slide, and press the “Delete” key on your keyboard.
8. To change the order of the slides in the presentation, click on the slide to be moved and while holding the mouse button depressed, drag the slide to its new location. Release your mouse button to place the slide.

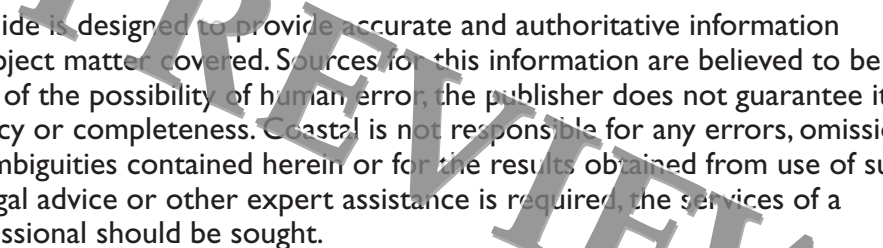
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2. Double click on the text box of the slide. A border and white handles appear around the text box.
3. Click on “Slide Show” on the menu bar. Then, click on “Preset Animation.” To turn off the effect, choose “Off.” If you wish to change the effect, there are many options to consider.

To edit content of any slide:

1. Double click on the slide you want to change.
2. Double click on the text box of the slide. A border and white handles appear around the text box.
3. Type the desired changes.

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