

CUSTOMER SERVICE Zone

WELCOME
Accomplish
Here
There

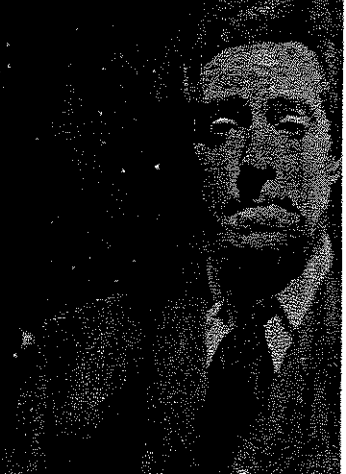


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CUSTOMER SERVICE Zone

Preparing Your Session

PREVIEW

About Engaging Training

Training is more effective when it's enjoyable. Nobody enjoys being bored. Thus, at Engaging Training our mission is to create learning media that's enjoyable – and even fun. Thus your trainees will be more engaged, and learning will be more effective.

At the same, training is serious business. Thus Engaging Training has one purpose: to help ensure your success. Thus our team is comprised of training industry veterans, and we offer expert content with simple learning points that are easy to remember, and employ on the job.

Introduction

You've entered another dimension of time—of space—of training. You've entered the *Customer Service Zone*.

In this dimension, training is fun, participants learn and leaders customize content to the specific needs of their organization.

Join Curt Hinderman as he discovers **W.H.A.T. makes great customer service:**

- Welcoming customers with friendly greetings and great attitudes
- Hearing them and understanding their needs
- Accomplishing customers' objectives and taking care of their needs
- Thanking them – sincerely – for their business

With this DVD-based training program and accompanying support materials, participants not only learn **W.H.A.T. makes great customer service**, but also how to use the skills and become more effective on the job.

Program Contents

This program contains the following materials:

Customer Service Zone program (DVD, online, etc.)

This video-based training program provides high-quality production value and a fun, memorable way to get learners engaged in the program content.

Leader's Guide, including reproducible participants materials

Within the Leader's Guide is everything you need to prepare and execute a customized program for customer service training.

- Two different agendas (2 hours or 4 hours) that will enable you to meet your scheduling needs.
- Multiple activities give you choice and control over which exercises will best meet your desired training objectives
- Reproducible participants materials make this program cost-effective, and easy to develop and customize.

PowerPoint™ Presentation

A PowerPoint™ presentation is provided to support the session. Simply delete or add slides as needed.

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Key Concepts and the W.H.A.T. Acronym

To maximize retention and improve your participants' job performance, we carefully crafted a simple, easy-to-remember acronym: **W.H.A.T.** Below are the four points of the **W.H.A.T.** acronym.

WELCOME

- Have a neat, professional appearance
- Acknowledge customers immediately - even if you're speaking with another person
- Be polite and friendly: smile, make eye contact
- Personalize: introduce yourself and address customers by name

HEAR

- Ask how you can help: identify customers' needs and expectations
- Listen carefully to customers concerns - assume nothing
- Repeat back to confirm understanding, and ask for clarification if necessary
- Document important information

ACCOMPLISH

- Meet and exceed customers' needs and expectations, quickly and correctly
- Focus on what you can do
- Follow through – own the issue, keep customers informed, and offer consolations when necessary
- Follow up – how else may you serve the customer?

THANK

- Genuinely thank customers for their business
- Let customers know you're always at their service
- Invite them to return, if appropriate
- Offer a little something extra, whenever possible

About this Guide

This guide is designed to support both experienced leaders and those new to training. The goal of this guide is to put choice and control in your hands. Several exercises are provided to support each of the key concepts. Review the activities and choose which exercises will be appropriate for your participants.

The Leader's guide is divided into four sections:

1. **Preparing Your Session** – Information and direction necessary to develop and implement a great program on customer service.
2. **Leader Materials** – Step-by-step guide to each of the exercises. Within this section is a subsection entitled *Activities*, which lists activities for each step of the W.H.A.T. Acronym. Simply identify which exercises are most appropriate for your participants and plan your session. Exercises can also be used as follow-up and/or refresher tools during team meetings to help reinforce learning.
3. **Participants Materials** – Materials for participants to help them transfer knowledge, skills and abilities back to their work environment. **All participants materials may be reproduced free of charge.**
4. **PowerPoint™ Slides** – Support the needs of visual learners, as well as a great guide for the Leader too!

PREVIEW

Planning Suggestions

Here are suggestions for planning your session:

- Watch the *Customer Service Zone* and review the exercises and participants materials.
- Identify your time allotment for the training and choose an agenda.

Consider your participants:

- What is their level of experience?
- If you are unfamiliar with their level of experience, meet with their supervisors to assess skills and areas for improvement.
- Try to anticipate participants' objections to training. For example, are you dealing with a seasoned staff? Has the group experienced ineffective training in the past? Are there other issues in your organization that should be addressed or considered before training?
- When planning which exercises to use, begin with the end in mind. What do participants need to do differently as a result of this training?
- Determine which exercises best meet training objectives and participants' needs.
- Make copies of the participants materials.

Customize the training:

- Review the PowerPoint™ slides, adding or deleting as needed.
- Include any relevant organization-specific information. For example, does your organization have any customer service policies, procedures or expectations that need discussion during training?
- If you are using the *Customer Service Skills Practice* exercise, you may wish to review the sample situations provided, and further customize the situations for your organization. The more relevant the situations, the more likely participants will benefit.
- Add personal anecdotes and stories throughout training to help support key points. Stories are a great tool to help participants connect with the content. This connection provides the greatest opportunity for the information to be retained and employed on the job.

Agendas

Below are two agendas for the *Customer Service Zone* training program. Determine the time available for the program, and consider the needs and experience level of your participants when choosing which exercises to focus on during the program.

Two-hour Agenda

Introduction	10 min
<i>What Makes Great Customer Service?</i> exercise	15 min
View <i>Customer Service Zone</i> and Discuss	35 min
Break	10 min
W.H.A.T. It's All About!*	35 min
Wrap Up	15 min

* Choose two exercises that best meet the needs of your organization.

Four-hour Agenda

Introduction	10 min
<i>What Makes Great Customer Service?</i> exercise	15 min
View Video and Discuss	35 min
Break	5 min
W.H.A.T. It's All About! **	
WELCOME	30 min
HEAR	40 min
ACCOMPLISH	25 min
THANK	10 min
Break	10 min
Customer Service Skills Practice	40 min
Wrap Up	15 min

** Review each section of the W.H.A.T. acronym and determine which exercises best suit the needs of your participants and organization.

Checklist of Supplies

- Customer Service Zone* (DVD, online, etc.)
- A/V equipment (DVD player, projector, etc.)
- One copy of **Participants Materials** for each participant
- Flip chart
- Markers
- PowerPoint™ slides

Each activity requires specific materials. Please see the *Activities* section to determine which specific materials are needed for individual exercises.

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Leader's Materials

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Introducing the Session

Time: 10 min

Materials: PowerPoint™ (PP) Slides

Purpose: To introduce the program, get commitment from participants, and provide orientation.

SHOW PP slide 1 as participants enter the room.

BEGIN your program by welcoming participants. If necessary, introduce yourself and provide background information about yourself.

SHOW PP slide 2.

TELL participants that you're going to make commitments to them, and you're going to ask for commitments from them. You may want to say something like:

During our time together, I commit to you to make the session fun, memorable and a good use of your time. We'll focus on the aspects of customer service that will enhance your job performance and make you more successful.

In return, I'll ask you to commit to having fun, participating actively, and using what you learn to become more effective on the job.

DISCUSS program overview. Provide orientation as needed (restroom location, etc.)

TRANSITION to the next exercise by adding a personal anecdote or story that will get participants thinking about customer service from the customer's point of view, and identifying the behaviors associated with great customer service.

What Makes Great Customer Service? exercise

- Time:** 15 min
- Materials:** Flip Chart Markers, *What Makes Great Customer Service?* handout
- Purpose:** To get participants thinking about service from a customer's point of view, and identifying which behaviors are associated with great customer service. It also helps foster participation, interaction and group discussion. Many people come to a training session thinking they will be passive observers. This program is designed to keep the participants actively engaged in the learning process.

DISTRIBUTE the *What Makes Great Customer Service?* handout.

DIVIDE participants into groups of two or three.

ASK participants to spend two minutes discussing their worst customer service experiences. They should identify on their handouts the attitudes, behaviors or actions associated with their worst experience. Then **ASK** each group to spend two minutes discussing their best customer service experience.

DISCUSS as a large group which behaviors created bad service experiences. **DISCUSS** which behaviors created good service experiences.

* Although you'll discuss negative behaviors, only chart and post the positive behaviors you want to reinforce and support.

TRANSITION: TELL participants they're about to watch a fun, entertaining program about customer service. During the program, they'll become familiar with the W.H.A.T. acronym, which will enable them to easily remember the four steps to great customer service:

EXPLAIN to participants the W.H.A.T. acronym:

1. **Welcome:** immediately greet customers in a friendly and professional manner
2. **Hear:** ask customers how you can help, and listen carefully
3. **Accomplish;** own the issue and take action until customers' needs are satisfied
4. **Thank:** thank customers and invite them to return

TELL participants that while watching the program, they should note behaviors – positive or negative – related to the four W.H.A.T. points:

1. Welcome
2. Hear
3. Accomplish
4. Thank

Viewing Customer Service Zone

Time: 35 min
Materials: 18-minute program Customer Service Zone
Purpose: To view the program and reinforce key concepts

Prior to viewing, FOCUS participants on the following:

You're about to watch the story of Curt Hinderman, a customer service representative who has a lot of learn about customer service. Pay attention to the lessons Curt learns, when the tables are turned and he is the one in need of service.

NOTE TO TRAINER: *Customer Service Zone* is in 3 acts:

Act I: First Office Sequence – Curt gives bad customer service. Angela attempts to teach him excellent service.

Act II: Customer Service Zone - Curt receives bad service, while other customers receive excellent service. There are four primary scenes: diner, store, bank and hospital. Each represents, in order, one of the four W.H.A.T. learning points: Welcome, Hear, Accomplish, and Thank.

Act III: Second Office Sequence - Curt applies his learning, and gives excellent customer service.

VIEW DVD, *Customer Service Zone*.

After viewing, ASK participants to name the four points in the "W.H.A.T." acronym

DISCUSS *Customer Service Zone*. The table below can help facilitate your discussion.

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	Act 1: Office Sequence	Act 2: Customer Service Zone	Act 3: Office Sequence
Welcome	<p>OFFICE Curt gives bad service:</p> <p>In the waiting room, Curt talks on phone to a friend, while 2 customers wait, frustrated.</p> <p>When he finally acknowledges Jackie, he doesn't say hello or look at her; he casually beckons her while talking on phone with friend.</p> <p>His appearance needs improvement, his desk is messy and unprofessional, etc.</p> <p>Angela gives great service:</p> <p>She is neatly and professionally dressed.</p> <p>She immediately welcomes Mr. Spillman in a friendly manner.</p> <p>She greets the customer by name.</p>	<p>DINER Curt receives bad service:</p> <p>The diner employee (Mr. Spillman) doesn't say hello to Curt.</p> <p>He's unfriendly and rude: tone of voice, refusing use of phone, belching, etc.</p> <p>He says "you're not welcome" when Curt leaves.</p> <p>The other customer receives great service:</p> <p>In contrast, the diner employee immediately greets the other customer.</p> <p>He welcomes her with complimentary coffee.</p> <p>He's friendly and makes polite conversation.</p>	<p>DINER Curt gives great service:</p> <p>As diner employee, Curt has a neat appearance.</p> <p>He immediately welcomes the customer in a friendly manner.</p> <p>He addresses the customer by name.</p> <p>He remembers the customer's preference.</p>

	Act 1: Office Sequence	Act 2: Customer Service Zone	Act 3: Office Sequence
Hear	<p>OFFICE Curt gives bad service:</p> <p>Curt doesn't hear Jackie because he's talking with a friend on the phone.</p> <p>Because he's not listening, he mistakes her name as "Jack."</p> <p>Because he's not listening, he mistakes her needs, falsely believing she wants to close her account when in fact she wants to transfer it.</p> <p>He makes false assumptions and doesn't confirm understanding.</p>	<p>STORE Curt receives bad service:</p> <p>The retail clerk (Jackie) never listens, never confirms understanding.</p> <p>Curt asks for phones; because she's not listening, she sends him to clothes department.</p> <p>Curt asks to 'take her phone.' Because she's not listening, she mistakenly accuses him of harassment.</p> <p>Curt asks if he can use his credit card. Because she's not listening, she erroneously says yes.</p> <p>The other customer receives great service.</p> <p>In contrast, the retail clerk immediately asks the other customer how she can help.</p> <p>She repeats back to verify information.</p> <p>She asks a clarifying question to best meet customer's needs.</p>	<p>STORE Curt gives great service:</p> <p>As retail clerk, Curt immediately asks the customer how he can help and listens.</p> <p>He repeats back to verify information.</p> <p>He asks further questions and makes product suggestions to best meet customer's needs.</p>

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	Act 1: Office Sequence	Act 2: Customer Service Zone	Act 3: Office Sequence
Accomplish	<p>OFFICE</p> <p>Curt gives bad service:</p> <p>In Angela's office, we learn Mr. Fernandez has experienced non-stop problems and delays with Curt's service.</p> <p>Angela gives great service:</p> <p>Angela apologizes for the mix-ups and delays.</p> <p>She informs Mr. Fernandez that she has taken care of everything for him.</p>	<p>BANK</p> <p>Curt receives bad service:</p> <p>Despite Curt's urgent need, the bank teller (Mr. Fernandez) responds slowly.</p> <p>The bank teller – rather than focusing on what he can do – focuses on ways to avoid serving Curt.</p> <p>The bank teller fails to take care of Curt's needs because he forgot.</p> <p>When he does attempt to take care of Curt, he messes up the transaction, giving him \$100 instead of \$400. He then blames the mistake erroneously on Curt.</p> <p>The other customer receives great service:</p> <p>In contrast, the bank teller has taken care of everything for the other customer, kept her informed, and exceeded her needs and expectations. "That's what I'm here for," he states.</p>	<p>BANK</p> <p>Curt gives great service:</p> <p>As a bank teller, Curt tells Mr. Fernandez that he has taken care of everything.</p> <p>Curt has exceeded customer expectations by filling out all the paperwork for him.</p>

	Act 1: Office Sequence	Act 2: Customer Service Zone	Act 3: Office Sequence
Thank	<p>OFFICE</p> <p>Curt gives bad service:</p> <p>He makes no effort to show Mrs. Barlow, the health care employee, that he's grateful for her business: he makes little effort to help her, wishes he could leave the office early, and fails to thank her.</p>	<p>HOSPITAL</p> <p>Curt receives bad service:</p> <p>The health care employee (Mrs. Barlow) clearly isn't thankful for Curt's business.</p> <p>She ignores him, addresses him rudely, and makes no effort to help him – even when no other customers are present.</p> <p>The other customer receives great service:</p> <p>In contrast, the health care employee thanks the other customer profusely, saying "there is no business without U."</p> <p>She gives him a pair of Superbowl tickets simply for being the 82nd customer of the day.</p>	<p>HOSPITAL</p> <p>Curt gives great service:</p> <p>As a health care employee, Curt thanks the customer for her business.</p> <p>He acknowledges she has a choice of service providers, and thanks her for choosing his company.</p>

PREVIEW

Key Concepts: W.H.A.T. Welcome/Hear/Accomplish/Thank

- Time:** Varies depending on the agenda chosen and number of participants.
2-hour agenda: approximately 40 minutes
4-hour agenda: approximately two hours including one break.
- Materials** PowerPoint™ (PP) Slides, *W.H.A.T. Key Components* handout; see individual activities for additional materials.
- Purpose:** To review the key concepts identified in the W.H.A.T. acronym, and practice specific skills supporting each concept.

PRIOR to the program, determine which activities will follow the overview of the key concepts.

Overview of Key Concepts:

DISTRIBUTE the *W.H.A.T. Makes Great Customer Service* handout.

SHOW pp screens 3-6 and **DISCUSS** the key concepts supporting each letter of the acronym.

Below you'll find four bolded paragraphs, and the text for four related PowerPoint slides. This is to help you guide discussion of the four W.H.A.T. concepts: Welcome, Hear, Accomplish and Thank.

WELCOME: You know the saying, "You only get one chance to make a first impression." Volumes of research show that initial impressions are made within seconds of a first encounter. Research also shows that once an initial impression is made, it can be difficult and time consuming to change. Therefore, it's crucial in customer service to ensure the first impression is positive! So, how can we make sure we leave a great first impression?

PP SLIDE 3: WELCOME

- Have a neat, professional appearance
 - Acknowledge customers immediately - even if you're speaking with another person
 - Be polite and friendly: smile, make eye contact
- Personalize: introduce yourself and address customers by name

HEAR: Most people think they're great listeners. However, few of us really are. One reason is because we struggle with "staying present in the moment." If you've ever arrived at work and not remembered the drive there, you weren't present in the moment.

We often spend most of the day on autopilot, just going through the motions. This is where many of our customer service challenges begin: it's easy to get lost in our heads and make assumptions about what customers are saying. We need to be present and tuned in so we really **HEAR** what customers are saying. Here are a few things to consider:

PP SLIDE 4: HEAR

- Ask how you can help: identify customers' needs and expectations
- Listen carefully to customers concerns - assume nothing
- Repeat back to confirm understanding, and ask for clarification if necessary
- Document important information

ACCOMPLISH: Identifying and accomplishing customers' needs and expectations is the key to your success. This determines whether customers are satisfied and return, or disgruntled and spread a bad reputation about us. The best advertising is word of mouth, and taking care of customers' needs is the key to your future success. Here are some things we must consider when we set out to **ACCOMPLISH** customers' need and expectations:

PP SLIDE 5: ACCOMPLISH

- Meet and exceed customers' needs and expectations, quickly and correctly
- Focus on what you can do
- Follow through – own the issue, keep customers informed, and offer consolations when necessary
- Follow up – how else may you serve the customer?

THANK: Thanking the customer is perhaps the most important step of all. The Primacy/Recency Effect theory states we tend to best remember our first and last impressions. This means how we thank customers is as important as how we welcome them. So when **THANKING** customers consider the following:

PP SLIDE 6: THANK

- Genuinely thank customers for their business
- Let customers know you're always at their service
- Invite them to return, if appropriate
- Offer a little something extra, whenever possible

TRANSITION to your next exercise, turn to the Activity section of this guide.

2-hour agenda: choose a total of 2 to 3 activities

4-hour agenda: you'll be able to use most activities, depending on group size

Customer Service Skill Practice

- Time:** 2-hour agenda: n/a
4-hour agenda: 40 min
- Materials:** Make copies of the following handouts:
- Skill Practice Instructions (one copy per participant)
 - Skill Practice Scenario List (one copy per small group)
 - Coaches/Observers Feedback (one copy per participant)
- Purpose:** To provide participants an opportunity to practice and receive feedback when using the W.H.A.T. acronym and key concepts.

PRIOR to the training, review the Skill Practice Scenario List handout and, as desired, customize the scenarios to your organization.

DIVIDE participants into groups of three. One person is the customer, the second is customer service representative and the third is the coach/observer.

DISTRIBUTE the Skill Practice Instructions handout and discuss the interaction and role expectations for each member of the group.

DISTRIBUTE the *Skill Practice Scenarios* and *Coaches/Observers Feedback* handout. You can either assign a scenario to each group or you can let each group choose which scenario to practice.

Each group will complete the skill practice at the same time.

After the skill practice, the Coaches/Observers will provide feedback to the individuals. All groups then reconvene, and discuss the challenges and observations of the participants. Answer any questions participants may have about the interaction.

WELCOME Activities

The following WELCOME activities give participants an opportunity to discover, practice, and experience the key concepts of Welcome. Choose exercises based on your goals, audience and schedule.

Welcome

- Have a neat, professional appearance.
- Acknowledge customers immediately - even if you're speaking with another person.
- Be polite and friendly: smile, make eye contact.
- Personalize: introduce yourself and address customers by name.

Welcome Activity 1: You Only Get One Chance to Make a First Impression

Time: 15 - 20 min

Materials: PowerPoint™ Slides 7-16, copies of the *First Impressions* handout

Purpose: To show participants the power of first impressions, and reinforce the importance of having a neat, professional appearance.

DISTRIBUTE the *First Impressions* handout.

EXPLAIN that you're going to show several pictures of people on the screen. For each picture, participants will write down the first impressions that come to mind. Then, they'll rate how effective they think each person might be at providing customer service. They will use a rating scale of 1-5, with 1 being not at all effective and 5 being extremely effective.

SHOW each PP slide and ask participants to write their observations on their handouts. Remind participants to look at the pictures from a customer's point of view.

After you've shown the pictures, **DISCUSS** the participants' observations.

ASK the following questions:

- How did your first impressions influence your effectiveness ratings?
- What assumptions were you making about each individual?
- Do you believe your needs and expectations will be met with this individual serving you? Why or why not?
- How might your impressions affect whether or not you return to this organization?
- If you had an unfavorable opinion of this organization, what would need to happen to change your impression?

Welcome Activity 2: Meet and Greet

Time: 10-15 min

Materials: Flip Chart

Purpose: To brainstorm ways of effectively meeting and greeting customers and making a positive first impression.

ASK participants the following:

Have you ever walked into an organization and been ignored? It can be frustrating if you need assistance and no one even acknowledges you. Even if you don't need immediate assistance, it's always nice to be noticed. Always acknowledge customers as soon as possible - even if we're speaking with another person.

How do you currently acknowledge customers? What phrases do you use that work well?

CAPTURE effective phrases that work well on a flip chart.

What terms or phrases should we avoid when meeting and greeting customers? Answers will vary depending on your organization.

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Welcome Activity 3: Are We Really Seeing Eye to Eye?

Time: 10-15 min

Materials: none

Purpose: This is a fun, short exercise that encourages participants to make eye contact. It also gets participants up and moving.

DIVIDE participants into groups of two or three. Try to put together participants who don't know each other well. Ask participants to stand facing their partner(s).

EXPLAIN to participants that you will provide a topic of conversation, and then ask them to talk for a few minutes. Don't give participants any other explanation. You can have them discuss work-related topics like a new product or service, or non-work topics like hobbies.

When participants have finished talking, ask them to turn their backs to their partner(s).

ASK participants:

- What color eyes does your partner have? Are all participants able to answer the question?
- Why is eye contact important?
- When someone is smiling and making eye contact, what does this behavior say about the organization and the customer service rep?

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Welcome Activity 4: What's in a Name?

- Time:** 10 min
Materials: PowerPoint Slides 17-18
Remembering Names handout
Purpose: This is a fun, short exercise that gives participants tips and tricks to remembering customers names.

EXPLAIN to participants that it's always best to welcome customers by name. However, remembering names can be a challenge.

SHOW PP Slides 12-13 and **DISCUSS** the tips and tricks to remembering names.

DISTRIBUTE the Remembering Names handout. Participants should take turns introducing themselves. Other participants should then suggest ways to remember their names.

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HEAR Activities

The following HEAR activities give participants an opportunity to discover, practice, and experience the key concepts of HEAR. Choose exercises based on your goals, audience and schedule.

HEAR

- Ask how you can help: identify customers' needs and expectations.
- Listen carefully to customers - assume nothing.
- Repeat back to confirm understanding; ask for clarification if necessary.
- Document important information.

Hear Activity 1: Asking Questions

Time: 15-20 min

Materials: PowerPoint Slide 14
Asking Questions handout

Purpose: This exercise defines the difference between a need and an expectation. Participants will learn about 5 different types of questions that can be used to identify a customer's needs and expectations.

EXPLAIN to participants the difference between a need and an expectation. You may wish to say something like:

In order to best help customers we need to understand their needs and expectations. First, we must understand the difference between needs and expectations.

A need is "what" customers want; the expectation is "how" they want it. For example, if you're hungry you may order a pizza. The need is food. However, your expectation is that it will arrive hot. If the pizza arrives and it's cold, then you'll be disappointed even if your needs are met.

How do we determine customers' needs and expectations? We ask! And asking effective questions is an art form.

SHOW PP 19 and DISCUSS the different types of questions.

Closed-ended questions usually require a yes/no or short response. For example, “Do you need a new pair of shoes?” or “What size do you wear?” or “May I help you?”

Open-ended questions encourage a more in-depth response. For example, “How may I help you?” or “How did you come to this decision?”

Leading questions direct customers to give you the answer you want. For example, “Why do you feel like this is a good option for you?” versus just an open-ended questions like “What do you think of this option?”

Multiple-choice questions give customers options. For example, “Would like the red, the green or the blue?” or “Is it cash, charge, or check?”

Clarifying questions help you make sure you understood the customer’s needs and expectations. For example, “You said you were leaving town on Monday so you need your order to arrive by this Friday. Is that correct?”

DISTRIBUTE the *Asking Questions* handout and have participants practice writing the five different types of questions. Ask them to focus on writing questions that would specifically identify a customer’s needs and expectations for your organization.

DEBRIEF the exercise by having participants share examples of questions they developed.

Hear Activity 2: Can You Hear Me Now?

Time: 15-20 min

Materials: Sender's handout 1 and 2, file folders, blank paper, and pen or pencil

Purpose: This is an experiential exercise that helps participants discover issues about listening, making assumptions, asking questions for clarification, and identifying obstacles that block understanding.

DIVIDE participants into groups of two or three. A group of two will have one person as the sender, one as receiver. In a group of three, there will be one sender and two receivers.

EXPLAIN what you want participants to do, but don't explain the reason. Participants start back to back.

DISTRIBUTE Sender's handout 1. Receivers shouldn't see the senders handouts. You might wish to place the handout in a folder so that it's covered.

EXPLAIN to participants that the sender will describe a picture to the receiver. The receiver listens and tries to draw the image accurately; receivers aren't allowed to talk.

After the interaction, compare the sender's handout with the receiver's drawing. Discuss the results, then ask participants to switch roles.

DISTRIBUTE sender's handout 2, and have participants do the exercise again, but this time face-to-face. Also receivers may ask brief yes/no questions for clarification.

**For fun you may wish to have prizes or sweets for participants who have the closest replica to the original.

DISCUSS participants' observations. Several issues may arise from this exercise:

- One-way communication is less effective
- Even when you're focused and hear what's being said, you can still miss the message
- People make assumptions without realizing it
- Closed-ended questions are effective for getting details and clarifying understanding

Hear Activity 3: Let Me Get This Straight...

Time: 15-20 min
Materials: PowerPoint™ Slide 20, *Listening* handout, *Scenario Cards* handout
Purpose: To realize there are different types of listening, and identify effective ways to clarify understanding.

DISTRIBUTE the *Listening* handout.

SHOW PP 15 and **EXPLAIN** the different types of listening.

Clarifying – to clarify and/or get more information as needed, and ensure understanding

Restating – to show you're listening, and confirm interpretation and understanding

Summarizing – to review progress, summarize important ideas and facts, and establish a basis for further discussion

DIVIDE participants into groups of two.

NOTE: Prior to the training, review the Scenario examples and determine which are appropriate for your organization. You might wish to customize the scenarios, using those provided as examples.

DISTRIBUTE the *Scenario Cards* handout to Person A. Person A will communicate the lengthy message on the handout. Person B should listen carefully and use one of the listening types to respond.

Participants quickly realize that listening is more challenging than it seems.

DEBRIEF the exercise by having participants share their experiences.

Hear Activity 4: Just the Facts!

Time: 10-15 min

Materials: PowerPoint Slide 21; Flip Chart

Purpose: To help participants focus on important information to document for your organization.

NOTE: This exercise is a discussion about what customer information should be documented. Because this information varies depending on your organization type, you should customize this section and communicate documentation policies and procedures.

SHOW PP 16 and **DISCUSS** the Documentation Tips. Feel free to customize these as appropriate to your organization.

- Be clear, concise, and specific
- Focus on facts
- KISS – Keep it short and simple
- Avoid personal observations
- Avoid instant message abbreviations (i.e., LOL)
- Avoid personal shorthand

PREVIEW

ACCOMPLISH Activities

The following ACCOMPLISH activities give participants an opportunity to discover, practice, and experience the key concepts of ACCOMPLISH. Choose exercises based on your goals, audience and schedule.

ACCOMPLISH

- Meet and exceed customers' needs and expectations, quickly and correctly.
- Focus on what you can do.
- Follow through – own the issue, keep customers informed, and offer consolations when necessary.
- Follow up – how else may you serve the customer?

Accomplish Activity 1: Getting The Job Done!

Time: 10-15 min

Materials: Flip Chart

Purpose: This is a large group discussion to help participants identify ways of being more efficient at their jobs.

DISCUSS with participants the following:

- **What is our service process?** On the flipchart, map out how your product or service is delivered. You can do this as a flowchart and/or have participants symbolize or role play the process. This can be a great way of identifying bottlenecks.
- **Who are my partners in delivering service?** Ask participants to identify everyone – internal or external - who supports them in providing service to customers. This is a great opportunity to discuss internal customer service.
- **What can I do to make sure I accomplish customers' needs and expectations?** Ask participants to identify specific actions they take in order to effectively and efficiently accomplish customers' needs. Then ask what additional actions they could take to be even more effective and efficient.
- **How can I deliver more quickly?** Ask participants to brainstorm how the process can be more efficient.

Accomplish Activity 2: What I Can Do...

Time: 10-15 min

Materials: *What I Can Do* handout

Purpose: This exercise presents a list of customer service actions that are not possible. Participants should change the wording to focus on what they can do.

DISTRIBUTE the *Here's What I Can Do* handout.

EXPLAIN to participants that we must – whenever possible – avoid telling customers ‘no’. It’s always best to focus on what we can do.

ASK participants to review each of the statements and identify alternative responses. Remind participants they should focus on what they can do, rather than on what they can’t.

DEBRIEF the exercise by having participants share their responses. Correct any that focus on the negative.

PREVIEW

Accomplish Activity 3: Doing What You Say You're Going to Do!

Time: 15-20 min

Materials: Flip chart

Purpose: This discussion helps participants identify areas where they need to follow through and maintain consistency of service.

EXPLAIN to participants that every organization aims for consistent service and excellent follow through.

DETERMINE which of the questions below best apply to your organization, and use them to create a large group discussion about follow through.

You may wish to **CHART** participants' responses.

ASK participants:

- **What does follow through mean in our organization?**
- **How do we keep customers informed?**
- **When problems arise, what is the chain of command?**
- **What is our consolation policy when customers aren't happy?**
- **In what ways are we consistent about providing good follow through service?**
- **In what ways are we inconsistent?**
- **What could we do to be more consistent?**

PREVIEW

Accomplish Activity 4: Follow Up - Is There Anything Else?

Time: 10-15 min

Materials: Flip chart

Purpose: To help participants identify ways to follow-up with customers.

Because different services and industries require different types of follow up, this exercise requires customization prior to the program. During this exercise, discuss policies and procedures regarding customer follow-up.

DISCUSS your organization's policies and procedures on follow up.

Optional: have participants divide into groups and brainstorm additional questions to use when following up with customers.

Sample Questions:

- How else may I help you today?
- Do you have everything you need?
- Do you have other questions I can answer?
- Do you have all related products needed to enjoy your new purchase?

PREVIEW

THANK Activities

The following THANK activities give participants an opportunity to discover, practice, and experience the key concepts of THANK. Choose exercises based on your goals, audience and schedule.

THANK

- Genuinely thank customers for their business.
- Let customers know you're always at their service.
- Invite them to return, if appropriate.
- Offer a little something extra, whenever possible.

Thank Activity 1: Keeping It Real

Time: 10-15 min
Materials: Self-Reflection handout
Purpose: Discuss how to genuinely thank customers for their business

ASK

How often do you hear people say 'thank you' or 'have a nice day' - and you know they don't mean it?

SAY

People can tell when you say 'thank you' and you don't really mean it. We all need to be aware, and be sincere when thanking customers.

One way to be more genuine is to think about why you're thankful. Identify why you're thanking them, and what their business means to you. Without customers, you wouldn't have a job, and without a job, you wouldn't have a home, car, food, clothing, electronics, etc.

DISTRIBUTE the *Self-Reflection* handout. Ask participants spend a few minutes quietly answering the handout questions.

DEBRIEF the exercise by having participants share reflections with the group.

Thank Activity 2: At Your Service

Time: 5-10 min

Materials: none

Purpose: To discuss with participants the importance of inviting customers to return or - depending on your organization - letting them know you're at their service.

NOTE: Depending on your organization, you will need to customize an appropriate way to invite customers to return. For example, in the health care industry "Thanks and come again" might sound like you want customers to get sick or hurt again.

SAY

There are many ways of inviting customers to return. Let's discuss some of the ways we can let customers know that we appreciate their business, and/or that they can rely on us again in the future.

ASK

What phrases have you used effectively in the past? What other phrases could you use in the future?

DEBRIEF Give participants feedback on effective phrases, and redirect any that may send the wrong message to customers.

PREVIEW

Thank Activity 3: A Little Something Extra...

Time: 10-15 min

Materials: Flip chart, markers

Purpose: A fun exercise used to brainstorm creative ways of giving customers something extra.

DIVIDE participants into groups of 3 or 4. Give each group one colored marker and a piece of flipchart paper.

ASK participants to brainstorm ways to give customers a little something extra to thank them for their business. (For the leader: real-life examples might include frequent flyer miles, coupons, free upgrades, free shipping, etc. However, it's best not to share these examples with participants, but rather let them use their imagination.)

Participants should imagine they have an unlimited budget and complete decision-making authority. The goal is to be as creative as possible – even if ideas sound impossible. Each group should come up with its own list.

DEBRIEF the exercise by identifying which ideas could be used at your organization.

PREVIEW

What Makes Great Customer Service? handout

Think of your worst experience in receiving customer service. What attitudes, actions or behaviors by the staff contributed to your worst service experience?

Think of your best experience in receiving customer service. What attitudes, actions or behaviors by the staff contributed to your best service experience?

PREVIEW

Session Wrap Up

Time: 15 min

Materials: Make copies of the following handouts:

- *Action Plan*
- *Session Evaluation*

Purpose: To focus participants on how they will become more effective as a result of this training program, and provide feedback to you regarding the session.

DISTRIBUTE both handouts to participants.

EXPLAIN to participants:

•*Action Plan*: this describes what you will do differently as a result of the training. You will be asked to share some of your plan. The plan is yours to keep, and should be discussed and followed up with your manager.

•*Session Evaluation*: this provides feedback, and should be left with the session leader.

Have participants **SHARE** what they will do differently as a result of the training.

THANK participants, incorporating all key concepts from the THANK step!

PREVIEW

CUSTOMER SERVICE Zone

Participants Materials

PREVIEW

*What Makes Great Customer Service? **handout***

Think of your worst experience in receiving customer service. What attitudes, actions or behaviors by the staff contributed to your worst service experience?

Think of your best experience in receiving customer service. What attitudes, actions or behaviors by the staff contributed to your best service experience?

PREVIEW

Key Concepts W.H.A.T.

WELCOME

- Have a neat, professional appearance.
- Acknowledge customers immediately - even if you're speaking with another person.
- Be polite and friendly: smile, make eye contact.
- Personalize: introduce yourself and address customers by name.

HEAR

- Ask how you can help: identify customers' needs and expectations.
- Listen carefully to customers concerns - assume nothing.
- Repeat back to confirm understanding, and ask for clarification if necessary.
- Document important information.

ACCOMPLISH

- Meet and exceed customers' needs and expectations, quickly and correctly.
- Focus on what you can do.
- Follow through – own the issue, keep customers informed, and offer consolations when necessary.
- Follow up – how else may you serve the customer?

THANK

- Genuinely thank customers for their business.
- Let customers know you're always at their service.
- Invite them to return, if appropriate.
- Offer a little something extra, whenever possible.

PREVIEW

First Impressions

Initial Impressions	Anticipated Quality of Service (1 = terrible, 5 = great)
1	
2	
3	
4	
5	

PREVIEW

First Impressions

Initial Impressions	Anticipated Quality of Service (1 = terrible, 5 = great)
6	
7	
8	
9	
10	

PREVIEW

Remembering Names: Tips and Tricks

- Immediately address customers by name. Use their names repeatedly, which will help you remember them.
- Think of people you know or know of – friends, celebrities, etc. - with the same name.
- Think of traits that a customer shares with the friend, celebrity, etc. (such as features, hair color, glasses, etc.). Use the trait to help associate and remember the name. For example, if a customer is named Brad and has blond hair, you might picture a blond Brad Pitt.
- For unusual last names, think of a gimmick. For example, if the customer is Mr. Bauer, his last name rhymes with tower, so imagine Mr. Bauer standing on a tower. If your customer is named Mrs. Cunningham, that rhymes with 'running lamb.' So imagine her watching a jogging sheep. Be creative and have fun. It works!

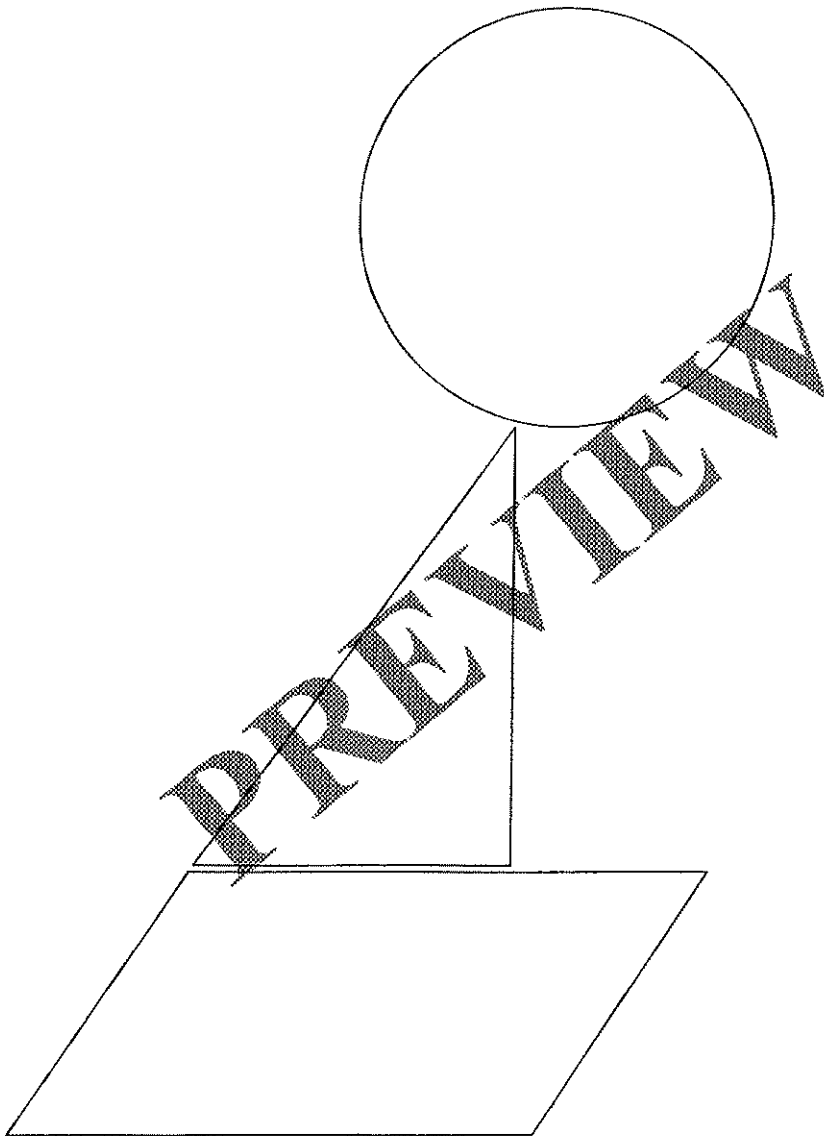
PREVIEW

Asking Questions

Types of Questions	Write your examples below:
Closed-ended Questions	
Open-ended Questions	
Leading Questions	
Multiple Choice Questions	
Clarifying Questions	

PREVIEW

Sender's handout 1



Sender's handout 2



Listening

Clarifying – to clarify and/or get more information as needed, and ensure understanding

Restating – to show you're listening, and confirm interpretation and understanding

Summarizing – to review progress, summarize important ideas and facts, and establish a basis for further discussion

PREVIEW

Scenario Cards

Customer: On Tuesday, December 2nd, I am flying to Boston from San Francisco. I will need the product to arrive in California at least one week prior to my departure. I want to make sure it arrives safely in San Francisco before I leave town. If there is a problem and you can't get the product to me by the deadline then after November 25th you're going to have to send it to my Boston location.

Customer: I am recently divorced and I need to cancel my current joint account and create an individual account. I will need both a checking and a savings account in my name. Instead of just a regular checking or savings account maybe I should look into a money market account and just have one account instead of two.

Customer: I'll take the Denver omelet, but I want an egg substitute used instead of real eggs. I do not want any mushrooms or green peppers but I would like to add a side of hollandaise sauce and extra cheese. I would like toast instead of pancakes and could you bring me a sugar substitute as well as grape jelly for my toast.

Customer: I need to see the doctor because two weeks ago I started to experience symptoms. It started as a tingling in my leg and I thought that my leg had just gone to sleep. Then two days later, it felt like pins and needles in my leg. Now, for the last three days I have noticed a new black and blue mark on my leg.

Here's What I CAN Do

Listed below are phrases that customers might hear. Rephrase or refocus these comments on what you CAN do.

Sorry, I can't give you cash back on this returned item, it's against our policy.

Our store is out of that item, you will have to go to our store across town.

I'm not the person you need to talk to—you're in the wrong department.

We deal with customers in the order that they arrive—everybody thinks they are in a hurry.

The fact that your order didn't arrive on time is not my fault.

I'm with another customer—I can't help you now.

PREVIEW

Self-Reflection

In the *Customer Service Zone*, Curt says “Angela, you’re just a temp. You’re not my boss.” Angela replies, “You’re right. The customers are your boss. Without them, there’s no dining out, electronics, cash, health care. If you want them to help you, you need to help them.”

The same is true when we thank customers for their business – we’re also thanking them for what they give us as individuals.

Take a moment and reflect. Your customers write your paycheck. Why else should you be thankful for their business? What are the other goods or services for which you rely on them?

PREVIEW

Skills Practice Instructions

Your Mission:

To form a group of three individuals and practice the key concepts and other information discussed in today's program.

Once your group is formed, determine the roles:

Two people will participate in the customer service interaction (one person is the customer, the other the customer service professional). The third person will be the observer.

The Tasks:

1. **Determine your discussion topic:** You may choose a scenario from the scenario list, create your own, or the leader may designate a scenario.
2. **Before you begin:** Discuss the situation, then review the W.H.A.T. acronym and key concepts.
3. **Begin the interaction.** Practice the material covered in the program. Stay focused on the task.

Notes to the Players:

1. **Customers:** Act like a real customer with realistic requests, responses, etc. Be reasonable; avoid exaggerating or being difficult for the sake of being difficult.
2. **Service Professional:** Think about the key concepts discussed today and focus on applying as many as possible.

Coaches: Observe the interaction and keep the skills practice on task. Then report to the large group.

Skills Practice Scenario List

- Below is a list of possible scenarios. Choose from this list or create your own.
- Customer can't decide what he/she wants.
- Product or service wasn't delivered on time.
- Customer wants a refund or exchange.
- You're helping a customer when a new customer interrupts and demands immediate attention.
- Customer is confused about how product or service works.
- Customer wants to use a coupon or advertisement that has expired.

PREVIEW

Observer's Guide

What effective words or phrases did the service professional use to make customers feel welcome?

Was the service professional really hearing the customer's needs? How could you tell?

How did the service professional accomplish the customer's need and expectations?

How did the service professional thank the customer for his/her business?

List the actions the customer service professional did best. List the actions that could be improved.

Action Plan

1 List the one most important thing you learned or hadn't thought about prior to this training.

2 List two others things you learned or thought about today that could help you be more successful and effective.

PREVIEW

3 List three specific actions or techniques that you will use on the job.

Session Evaluation

On a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree, how would you rate the following statements?

This program was well organized. 1 2 3 4 5

I can use the information provided
in this session. 1 2 3 4 5

I will remember and use the
W.H.A.T. acronym and key components. 1 2 3 4 5

The program was memorable and fun. 1 2 3 4 5

The leader was well prepared
for the session. 1 2 3 4 5

What was your favorite activity or exercise during the program?

What would you suggest to improve this program?

Would you recommend this program to others?

PREVIEW