INTENSIVE CUSTOMER SERVICE TRAINING MODULE

Developed by San José Public Library for the Silicon Valley Library System

Purpose

This is an intensive customer service training for library employees with an emphasis on welcoming behaviors so that they are more confident about approaching and interacting with customers and better able to provide positive experiences for library users.

Training Timeline

This is a two-day training that works best over three-weeks, with the middle week off.

Training Participants

It is critical to train multiple employees from a library at the same time to facilitate team building and sustainability of the learned behaviors once back at the library.

Logistics

- Train offsite where there will be no interruptions and to promote bonding, learning and creative thinking.
- Secure a large meeting space, with open space for activities and movement (no obstructions).
- Arrange the room with seating at tables (for note-taking) that face the presenter

Equipment and Supplies

- 6-8 flipcharts and markers
- 12-16 soft balls or toys for tossing
- Several different style hats and clothing, glasses, feather boas, etc.
- A deck of playing cards
- A pack of index cards
- A tambourine
- Copies of the handouts in this manual

Pre-Workshop Exercise *(see Attachment A: "Pre-Workshop Exercise")*

About one month prior to the training, give participants the Pre-Workshop Exercise and instruct them to:

- Visit a library where they are not likely to be known by any of the staff and spend about a half an hour asking questions and observing staff.
- Think like a customer during their visit, not like someone who works at a library!

Answer the questions on the Exercise sheet and bring the sheet with them to training.

Training Day One – Define and Practice Approachability, Connection, and Closure	
Minutes	**Activity**
5	**Welcome and Logistics** • Introductions, training packet (agenda), bathrooms, food
10	**Ground rules** • Establish the importance of mutual respect, listening, electronics off, return promptly from breaks, confidentiality, participation, and fun. • Cultivate attitude of curiosity and experimentation. • Help trainees welcome any feelings of uncertainty or nervousness as these are signs of moving out of their comfort level and into a place where learning is possible.
20	**Timelines and Groups Exercise** *(see Attachment B: "Timelines and Groups Exercise")* • Have the trainees form a line by years of library service. • Have each one state their name, the number of years in library service and the number of libraries. • Form groups in three areas of the room based on whether the oldest, middle or youngest in family, then discuss characteristics of each based on birth order as well as generation.
20	**Pre-workshop Exercise** • Ask the trainees to think about the pre-workshop exercise and rank their experience from 1 to 5, best to worst. • Form groups based on how they rated their experience during pre-workshop. • Have them discuss within their groups why they gave their rating number and then debrief with whole group. (Note: people who are shy sometimes give high marks to staff who are **not** approachable. Watch for this.) • Discuss these questions: How did you feel in your visit as a customer? What impression did you get before you spoke to anyone? Write their answers on a flipchart and look for the words that signal approachability, or the lack thereof.

20	**Service Model Principles** *(see Attachment C: "Summary of Customer Service Elements")* - Discuss trends in customer service or your library's customer service principles. - Flipchart main principles. Continue to refer to these. - Overview of approachability, connection, closure in "Summary of Customer Service Elements" handout.
20	**Power Walk Activity** - Divide trainees into Apples and Oranges by counting off (these two groups will be used in subsequent exercises). - Apples are told to make eye contact, Oranges are told to avoid eye contact as they walk around each other. Then switch. - Have one group make eye contact, have the other make brief eye contact then look away, sliding their gaze to the side. Then switch. - Have one group stand tall and confident, have the other slump and look down. Then switch. - Debrief on the feelings aroused by each variation.
20	**Break**
20	**Appearance Game** - Have someone who is dressed in business casual attire stand at the front of the room. - Have several other trainees add hats and feather boas to their outfits - Ask the remaining trainees to line up in front of the person they would ask for help getting resources for a term paper, information on health issues, child care, etc. - Keep the subject of the questions fairly serious. Avoid suggesting there are appropriate questions for people in inappropriate dress (hat making, feather dancing, skateboarding, etc.) - Talk about your guidelines for dress.
15	**Status Walk** - Everyone takes a playing card and **without looking at it**, holds it face out on their forehead. - Everyone walks around without talking, acting towards others as their status dictates based on their rank. Ace is low, King high. - After 2 minutes of milling around, ask to separate into groups based on what they think their status is – low, middle, high. - Debrief on what signals led them to their decision. How did it feel to be high status? Middle? Low?
5	**Introduce Connection** – The importance of showing sincere interest through verbal and nonverbal cues, active listening, body language, tone of voice.
20	**Switch Story** - Pair trainees to practice focus and connection. - Have one trainee begin a story about a mode of transportation on a

	planet other than Earth.
	• At irregular intervals, say "Switch" to the group, requiring the listener to take up the story and continue. Do this several times.
	• Debrief using flipchart to record "What Skills, Behaviors, Attitudes helped you connect and do the task easily."
	• On a second chart, list "What Skills, Behaviors, Attitudes slowed, stalled or blocked the connection/task."
	• Helping skills = Interactive Skills (listening, connecting, openness, collaboration)
	• Blocking skills = Analytical Skills (thinking, controlling, planning what you will say next)
	• Talk about how we sometimes move too quickly from interactive mode to analytical mode. Both are valuable, but staying in the interactive mode longer will yield better results in customer service.
20	**Ball Toss Focusing Exercise** • Form two circles (Apples and Oranges). • One person in each circle is the designated ball receiver, who tosses a soft ball or toy to someone in their circle. • Each catcher raises a hand after catching the first toss then throws to someone else in the circle after making eye contact. (The raised hand prevents others from throwing to that person.) Complete the circle. • Now each member of the circle has one person to throw to and will throw to that person each time but only after eye contact and connection. Don't throw until your catcher is ready. • Once the tosses are moving smoothly, a trainer continues handing balls or toys to the receiver. (10-12 or more, depending on size of circle) • If one connection is lost, the system breaks down!
20	**Tone Exercise** *(see Attachment D: "Suggested Customer Friendly-Phrases and Questioning Techniques")* • This exercise requires some acting ability. Using the Suggested Customer Friendly Phrases Sheet, read one phrase with 7 different tones of voice that reflect mood or attitude. • Trainees write 1 – 7 on paper and record whether they would want help from someone based only on the tone of voice they hear. • Have them do it once with eyes closed, just listening, and again watching the speaker's facial expressions. • Follow this by having them practice in pairs using the phrase and tone of voice given to them or drawn from a hat, so they all get a chance to practice out loud. • Have them practice in front of the whole group, using the phrase and tone they feel comfortable portraying, and/or • Have four people stand in front of the group and read the same line in different tones of voice and have people line up in front of whom they want help from.

	• Debrief on how attitude and mood are conveyed through tone of voice.
60	**Lunch**
30	**Voice Mirroring** • Begin by having a trainer demonstrate the technique to the whole group using a script like this (spoken slowly and clearly): "I want you all to listen closely to me and as I speak, see if you can softly say the words I am saying as I say them. Try to anticipate the words I will use so you can say them with me. And now, say them only in your head." • Explain voice mirroring, and then have trainees practice in pairs, and/or • Form 2 circles (apples and oranges) facing each other and have them voice mirror the partner across from them for 15 seconds, then move the inner circle and do it again, etc. • Ask if they improved with practice and debrief on how using the technique allows the listener to focus so completely on the speaker, it is almost impossible to react emotionally. A very valuable tool when listening to complaints from a difficult customer!
30	**Inquiring for Clarity/Active Listening Activity** • Explain active listening techniques: voice mirroring, affirming sounds and body language (I see, uh-huh, nodding, etc.) paraphrasing, and inquiring for clarity. • Each person has a role as Speaker, Active Listener and Receiver. • The Speaker will talk about something they experienced, preferably a situation requiring a solution of some kind. (Example: I have to keep my dog inside while I'm at work and I'm afraid she's getting bored.) • The Active Listener provides cues that the Speaker is understood, asks questions to clarify, and paraphrases to demonstrate understanding. • When ready, the Listener recaps the important information to the Receiver. • The Speaker provides feedback on Listener accuracy. • Discuss the importance of accurately handing off complex questions so the Speaker does not have to tell the same story to multiple listeners.
15	**Discussion** • Have the group talk about the ways the techniques practiced in the exercises foster connection and improve understanding of customer needs • Discuss the components of an ideal connection phase in customer service • Explore opportunities for teachable moments as a way to connect to customers as well as providing value added service
10	**Closure** • Introduce the concept of closure as the important third element that follows approachability and connection. • Describe an ideal closure for a customer interaction including follow

	up phrases (Did I answer your question? Is there anything else I can help you with?), information about ways to learn more (databases, Website, etc.) and programs that might be of interest.
	• Emphasize the importance of body language, eye contact, tone, etc. during closure.
20	**Break**
15	**Wrap-Up Activity**
	• Give each trainee and index card and have them write down what skill they think is most important in providing excellent customer service
	• Have them each pass their card 10 times while the trainer counts from 1 to 10.
	• Have each one pair up with someone else and decide between them on the number of points to assign to each card based on the importance of what is written there so the points add up to 7.
	• Have them write the scores on the back of each card and then pass 10 times again, pair up and assign points to the cards in their hands.
	• Repeat the process 7 times.
	• At end, find the cards with highest score (highest is 35) and write those skills on a flipchart.
	Note: This is exercise is very energizing because of the speed.
20	**Revisit Pre-Workshop Exercise**
	• Ask this question: Keeping in mind approachability, connection, and closure, how did the staff in the library you visited perform in each area?
	• Ask trainees to decide if they want to rate their experiences differently.
	• Have them group by rating and explain whether they changed it and why.
10	**Homework**
	• Hand out index cards.
	• Ask the trainees to keep a list of any barriers they encounter during the upcoming work week in practicing approachability, connection, and closure.
	• Have them also list challenges in performing their jobs according to your library's service principles.
5	**Evaluation** *(see Attachment E: "Evaluation Form")*

Day Two - Intensive Customer Service

Minutes	Activity
20	**Rhythm Clap Focusing Exercise** • Have the group stand and form a large circle. • Establish an easy rhythm with the tambourine • Start with solos, where each person claps twice with the tambourine, around the circle. • Then work in pairs. Two people face each other and clap twice, then one turns 180 degrees to form a new pair, who clap twice, then one turns to form a new pair and so on. • Call out "Change" to change the direction at random. • To be successful, trainees must be present, listen, relax, pay attention and don't second guess! This is a good warm up to begin the day.
20	**Customer Experience Brainstorm** • Count off for groups of 5 and have them stand in front of blank flipchart with a dark pen and a light pen. • Have them write 1-13 down left side and in 3 minutes think of 13 things you would see or experience in excellent customer service. • Then tell them to take 3 minutes to pick the top 3 things and circle them with light pen. • Debrief group findings and flip chart results. • Get top pick from whole group, then 2nd, then 3rd.
10	**Review** • Revisit approachability, connection and closure as phases of a customer interaction. • Discuss the importance of confidence and believability as concepts that relate to specific behaviors and skills that are within our control. • These skills and behaviors are what we're learning in the activities and exercises. Sometimes we think we know something just by being told, but new skills take time and practice. • Doing something once isn't enough, especially when you find yourself in stressful situations. • Revisit Ground rules
10	**Discuss Homework** • What did trainees notice during the week about the approachability, connection and closure? • What non-verbal skills did you use to show you're making a connection? • Review the Switch Story exercise and the importance of staying in interactive mode before becoming analytical. • Review how to show you are listening. (Eye contact, body language,

	nodding, leaning, using affirming sounds)
	• Review verbal skills (paraphrasing, inquiring for clarity, teaching customers, avoiding jargon - which can be a barrier to good communication).
20	**Voice Mirroring/Five Spot Exercise**
	• Ask who used Voice Mirroring during the week and have them describe.
	• Do a short practice with trainer, have trainees mirror softly then silently.
	• Strengthen the skill in groups of five with one to focus using voice mirroring, one storyteller and 3 people to provide distractions.
	• The person behind the focuser is reciting and incomplete "Mary had a little ____"
	• The person to the left is spelling 3 letter words, "c a t spells ___" and moving their arms rhythmically.
	• The person to the right side is reciting simple addition, "2 + 3 = _" and moving their legs rhythmically.
	• The focuser needs to listen to storyteller, fill in the blanks left by the people around them and mimic their arm and leg movements for a full minute.
	• The focuser gives 2 sentence recap of story they heard.
	• Focuser becomes storyteller and everyone moves counter clockwise to have a new focuser.
	• This is a great way to build those listening skills muscles!
20	**Break**
30	**"Yes, And"**
	• Explain the difference between "yes, but…" and "yes, and…" The first negates an idea; the second affirms it and adds to it.
	• Divide the group into pairs and give them a brief scenario to develop. (For example: Design a great Children's Library on the moon.)
	• Each member keeps saying "yes, and… to build on the plan.
	• Vary the responses with things like "What I like about your idea is…"
	• "Yes, and…" is a mindset that shows in both words and gesture.
	• We can learn to build on people's ideas instead of blocking or negating them.
	• Debrief value of 'yes, and…" and how it relates to customer service.
20	**Samurai Focusing Exercise**
	• Have everyone stand in one large circle, or divide apples and oranges into two circles, depending on size of group
	• The first Samurai raises an imaginary sword high, makes eye contact with their victim and says "Hi-yah" with a stroke that cuts them in half.
	• The victim points their sword across circle, making eye contact as they

	die and send their sound across the circle to the new Samurai. • Focus and connection make this an invigorating dance-like exercise.
30	**Wedging** • Demonstrate technique of redirecting a conversation when someone is in a loop or talking non-stop by finding the arc of their conversation and wedging in during the brief pause at the end of an arc • Discuss what you are listening for: the emotion. • Don't go right to a solution, you must acknowledge the emotion for someone to feel heard and be willing to stop. • Practice in pairs. Have a talker discuss something emotional for them and have the listener wedge in and acknowledge that emotion. Have them switch roles. • Discuss how it worked and where it might be useful.
60	**Lunch**
20	**Ball Toss Focusing Exercise** • Form two circles (Apples and Oranges) • One person in each circle is the designated ball receiver, who tosses a soft ball or toy to someone in their circle • Each catcher raises a hand after catching the first toss then throws to someone else in the circle after making eye contact. (The raised hand prevents others from throwing to that person.) Complete the circle. • Now each member of the circle has one person to throw to and will throw to that person each time but only after eye contact and connection. Don't throw until your catcher is ready. • Once the tosses are moving smoothly, a trainer continues handing balls or toys to the receiver. (10-12 or more, depending on size of circle) • If connection is lost, the system breaks down!
15	**Status Practice** • Get 2 volunteers to stand in front of whole group. Their props are 2 chairs and a table. • Hand each one an index card which says: High Status, Low Status, Raise Your Status, Lower your status, or Match their status. • Have them act out their status without talking, using table and chairs when appropriate. • Ask who is more approachable. For clarity, ask someone in the audience to approach them. • Discuss how differences in status work against approachability and connection, and how a desk can affect status
20	**Peer Coaching** *(see Attachment F: "Instructions for Peer Coaching," Attachment G: "Customer Behaviors Checklist" and Attachment H.1 and H.2: "Behaviors Ratings Grids")* • Get people get into pairs. • Have them read the Peer Coaching Instructions and Performance Standards and discuss in their pairs how to get from Good to

	Excellent.
	• Ask them to decide and write down what skills they want to work on.
	• Allow time for questions and answers so they understand exactly what to do back at work.
15	**Jargon**
	• Discuss how the use of library jargon can confuse and create barriers for customers
	• Have group identify words they use that are jargon and write them on a flip chart
15	**I'm Sorry**
	• Discuss the habit of apologizing for things that aren't our fault.
	• Have trainees identify phrases that sometimes trigger apologies.
	• Brainstorm ways to avoid saying "I'm sorry" in words or attitude.
20	**Break**
30	**Jargon/I'm Sorry/Peer Coaching Tag**
	• Have trainees pair up, then split pairs to form 2 large groups.
	• Each group comes up with a team name and team cheer.
	• When they earn a point, they do their team cheer.
	• The trainer acts as a customer, while a member of the first team plays a staff member, and they role play a library scenario.
	• Anyone can say "time out" if they hear library jargon, "I'm sorry" in words or attitude, a lack of clarity or active listening.
	• They can also say "time out" to describe good skills and behaviors such as eye contact, smiling, pleasant tone of voice, etc.
	• Accurate observation and description is what earns points.
	• After a "time out" the other team sends in a staff person and another scenario takes place.
	• Someone keeps score on a flip chart, and the scorekeeper is the judge as to whether the "time out" was accurate and descriptive.
	• Chart points, the first to get to 5 wins. (A group of good players may need to state 3 observations to earn one point.)
10	**Affirmation**
	• Have them stand up and state which skills they will practice.
	• Applause all around for hard work and commitment to Excellent Customer Service!
5	**Evaluation** *(see Attachment E: "Evaluation Form")*

Pre-Workshop Exercise

Complete and Bring to Training

Instructions: Read through this sheet carefully. Then go to a library where you are not likely to be known by any of the staff. Spend about a half an hour in the library asking questions and observing staff. Answer the questions below and bring this sheet with you to training. Try to think like a customer, not someone who works at a library!

1. What library did you visit: _____

2. Could you identify who worked there? If so, how?

3. How did you feel in the first few minutes of being in the library knowing you wanted help?

4. Were you greeted either with a smile or eye contact or a verbal exchange? If yes, did you initiate the greeting or did they?

5. Ask for help with at least 2 of the questions below while at the library. Ideally, it will be from different staff members. Don't start by going to a reference desk.

    a. You want to get a list of businesses in the area that offer landscaping services (or substitute your own interest) because you are interested in starting your own business.
       Start by asking: **"Where are your business books?"**
    b. You want to purchase a video camera (or substitute your own interest) and want current reviews.
    c. You are trying to find out if it is really better to drink bottled water than tap water, and you want something that has more authority than what you can find on the web (or substitute your own interest).
    d. Your relative is suffering from migraines and you want to help, so you want current information on the link between nutrition (or sleep, or chocolate or?) and migraines.

6. Did the staff member encourage you to learn or did they do the work for you?
   Did the staff member make eye contact? _____ Smile at you? _____

7. Were you comfortable with the service provided? Why or Why Not?
   (Try to imagine that you really need and care about the information you are requesting)

Timelines and Group Exercise

Information to help you understand birth order:

Typical traits of the first born: responsible, logical, rule-abiding, perfectionist, driven, authoritarian

Typical traits of the middle child: negotiator, insightful, realistic, creative, independent, passive, solitary

Typical traits of the youngest child: highly social, creative, laid-back, unconventional, dependent, manipulative

Information to Help You Communicate Across Generational Gaps

Traditionalists, born before 1945, comprise about 15% of the workforce. These workers lived through the Depression and two world wars. They tend to trust authority, respect rules, and follow the chain of command. Valuing loyalty, they are loyal to institutions. They look for courtesy, have a strong work ethic, and expect mutual accountability.

Baby Boomers, born between 1946 and 1964, make up almost half of the labor force. They grew up with traditional values, and may have seen their work lives crumble with layoffs and reduced benefits. Boomers tend to have a strong work ethic and hold many senior-level management positions. As a group they rebelled against authority then accepted it to attain financial security in their highly competitive, over-supplied age-group. They like recognition and prefer to be asked rather than told. They want others to value their experience and their work ethic.

Gen X, born between 1964 and 1982, are about 33% of the workforce. This group grew up with computer technology. They tend to educate themselves and have high expectations. They want multiple career paths, choices, and a voice in what's going on at work. They are collaborative, care about security, and don't like being micromanaged. They want to be left to do their work while multi-tasking, which they do well. This group values time off and work/life balance.

Gen Y, were born between 1982 and 2000 and have been surrounded by computer technology since birth. They are used to sound bytes and Internet speed. They have integrated social with technological networking so seamlessly that most do not distinguish between the two. They do not respect workplaces that do not use the technology they view as essential to their existence. They have a casual, participative style and prefer teams. They may not recognize older generational strengths and tend to discount those not technologically savvy.

Don't assume others are like you in age, birth order, or style. Ask questions about their preferences and values. Treat others according to how they want to be treated, not how you want to be treated.

Summary of Customer Service Elements

Approachability

A successful customer interaction starts with being recognized, looking available and being approachable. The customer must feel comfortable coming to you for help in a situation that may be perceived as intimidating, risky, confusing or overwhelming. The verbals and non-verbals of the staff member set the tone for the entire communication and influence the depth and level of interaction. What impression are you making? Do you look trustworthy? Believable? Competent? At this stage, the communication is often completely non-verbal.

1. Personal Appearance – Are you dressed casually or professionally? Is jewelry appropriate? Are you neat? Clean? Dressed in current styles? Is your appearance appropriate for your library's clientele?
2. Initiating Contact – Who initiates eye contact?
3. Facial Expression – Do you smile or have an otherwise open expression?
4. Posture – Do you look available and alert?
5. Circulate – Are you moving around so that you can make contact?
6. Recognizable – How will someone know to ask you?

Connection

A successful customer contact requires that the staff member show interest through the use of verbals and non-verbals. Active listening skills show interest and help identify the customer's needs. Once the need is clearly identified, the staff member should use their skills or refer the customer as appropriate to respond to the customers needs. It is important to use your position as the person who knows the environment to help the customer feel not only comfortable but empowered.

1. Non-verbals
    a. Face customer
    b. Maintain eye contact
    c. Gesture (nod head, lean in, open arms)
2. Verbal
    a. Tone of voice
    b. Avoid jargon or explain necessary library terminology
    c. Use questions to identify needs
    d. Rephrase question or request to ensure understanding

Closure

To close the interaction, the staff member should verify with the customer that they are satisfied with the results and let the customer know what options are available for further assistance. The end of the interaction should include an acknowledgement of some kind which can be verbal or non-verbal.

1. Did you check in to see if their needs were fulfilled?
2. Did you let them know what options they have for further assistance?
3. Did you smile and say something to close the communication?

Suggested Customer-Friendly Phrases and Questioning Techniques

Try using these
1. Are you finding what you're looking for?
2. Please tell me more
3. The library can be confusing. Let's start by ...
4. That's a tricky question, I'd start by ...
5. What have you tried already?
6. What type of information do you need?
7. What other information do you need?
8. Yes, and ...
9. What I can do is ...
10. Can you tell me more about what you're looking for?
11. What about [insert subject here] would you like to find?
12. What would you like to know about ...
13. That's a difficult question

Try not to say
1. You'll have to…
2. I'm sorry but…
3. We can't do that.
4. I don't know.
5. I will try. (Instead tell them what you will do.)

Positive statements to energize interaction
1. Yes, we have that kind of information.
2. Sure, we have academic journals.
3. You've come to the right place.
4. We have that
5. Sure, I can help with that.
6. We've got a lot on X topic
7. My name is X and I'll be able to help you ...

Rephrasing
1. So you are looking for the effect of abc on xyz during the twentieth century. Is that correct?
2. Let me see if I'm understanding you correctly…

Intensive Customer Service Training
Evaluation Form

Date

1. Overall I found the workshop:

Poor 1   2   3   4   5   6   7   8   9   10 **Excellent**

2. The pace of the workshop was:
☐ Too Slow ☐ Too Fast ☐ Just Right

3. Today I learned:
☐ More than I expected ☐ As much as I could absorb
☐ About what I expected ☐ A little bit

4. How helpful were the workshop materials?
☐ Not helpful at all ☐ Helpful during the workshop
☐ Very useful, will use again

5. What I found most valuable was:

6. What I found least valuable was:

7. What I would change about this workshop:

8. How will you use the skills acquired in this workshop?

Name (Optional): _____   **Library/Branch:**_____

Instructions for Peer Coaching

Peer coaching is important to maintaining a newly acquired skill or changing a behavior habit. No matter how much we absorb during a training session, improvement is less likely to be sustained over time if we do not actively practice what we learned. Peer coaching provides an opportunity for training participants to practice using customer service behaviors until they come naturally.

Each staff member who attends the training will be part of a coaching pair. (If there is an uneven number of zone staff, there may be one coaching trio.) **Each member of the pair will be coached for at least 20 customer interactions.** The coach will observe the interactions and provide feedback using the Customer Service Behaviors Checklist.

The following guidelines will help make coaching effective:

- First, look over the Customer Service Elements Summary in your packet and **choose a skill or behavior you'd like to improve**. Discuss it with your coach and write it down on the Customer Service Behaviors Checklist under "Skill I Want to Improve." You can also look at the "Behavior Ratings Grid" and see where you would like to go from "good" to "excellent!"
- Establish a level of trust. Ask your coach to be honest with you. You and your coach are the only ones who will see your checklists.
- When providing feedback, use non-judgmental language, such as "I saw you smile" or "I didn't hear you paraphrase." Saying you saw or didn't see, you heard, you noticed, etc., may seem awkward at first, but if used consistently the person receiving feedback will be more likely to hear what you are saying and less likely to be defensive. **This isn't the time for praise or criticism**; be like the impartial eye of a camera!
- When receiving feedback, use the **active listening techniques** we learned in the training; it will improve the effectiveness of the feedback and it's a great way to practice! Then decide upon a course of action, such as continuing to focus on a skill you would like to improve or a behavior you would like to change.
- While working in coaching pairs, you'll wear "Trainee" and "Trainer" badges. **Let your customers know** that we're involved in a training designed to improve customer service and that their transaction will be observed; then ask the customer if this is acceptable. If not, don't observe the transaction.
- **Provide feedback as soon a possible after the transaction**. At busy times, coaching pairs will need to meet right after their zone hour ends.
- Relax and **HAVE FUN!**

Customer Service Behaviors Checklist

APPROACHABILITY	Yes	No	Comments
Eye Contact			
Smile			
Body Language			

CONNECTION	Yes	No	Comments
Initiate Contact			
Listen			
Paraphrase			
Inquire as needed			
Teach			

CLOSURE	Yes	No	Comments
Is this everything you need?			
Alternative question/statement			

SKILL(S) I WANT TO IMPROVE:

Notes:

Intensive Customer Service Training Module

	Excellent	Good	Fair	Poor	Very Poor
Eye-contact	Initiates eye-contact with customer. Sustains eye-contact both at the beginning and at the end of the interaction. Moderate to high levels of eye-contact throughout interactions over 10 sec.	Sustains eye-contact with customer both at the beginning and at the end of the interaction. Moderate to high levels of eye-contact throughout interactions over 1 0 sec.	Brief eye-contact with customer both at the beginning and at the end of the interaction. Low to moderate levels of eye-contact throughout interactions over 10 sec.	Brief eye-contact with customer either only at the beginning or only at the end of the interaction. Low levels of eye-contact throughout interactions over 10 sec.	No eye-contact with customer at any time during interaction.
Facial Expression	Staff member shows a genuine smile both at the beginning and during the interaction. Does not need to smile throughout interaction to qualify for this rating.	Staff member shows a genuine smile at the beginning or during the interaction.	Staff member shows a fake smile (lower facial muscles only), but does not smile genuinely during interaction.	Staff member has a neutral facial expression, or frowns/sneers while looking down or away. Does not smile at any time. Inappropriate smile during interaction.	Staff member frowns/sneers directly at customer and does not smile at any time. Inappropriate smile throughout interaction.
Body language	Throughout interaction: head is at neutral position, shoulders and arms are open.	For most of interaction: head is at neutral position, shoulders and arms are open.	Head tilted down or shoulders hunched, but arms are not crossed before and during interaction.	Somewhat withdrawn from the customer: head tilted down, shoulders hunched, and arms crossed before and during interaction.	Withdrawn from the customer: turned away before and during interaction.
Personal appearance	Dress is clean, tidy, and appropriate. No gum chewing.	Dress is appropriate, but either slightly dirty or disheveled. No gum chewing.	Dress is appropriate but obviously dirty or disheveled. No gum chewing.	Dress is appropriate but both dirty and disheveled. Gum chewing receives Poor rating.	Dress is not appropriate. Body odor, if detected, receives Very Poor rating.
Availability	Visible to customer and free to interact — not engaged in another library activity. Does not place unnecessary barriers between himself/herself and customer during interaction.	Visible to customer but engaged in another library activity. Does not place unnecessary barriers between himself/herself and customer during interaction.	Behind desk or engaged in conversation with another staff member/cell phone. Occasionally places unnecessary barriers between himself/herself and customer during interaction.	Behind desk and engaged in conversation with another staff member/cell phone. Routinely places unnecessary barriers between himself/herself and customer during interaction.	Not visible to customers.
Duration	Short interaction (10 sec.), efficiently responds to customers' additional questions.	Short interaction (10 sec.), responds to some questions in greater detail than necessary.	Moderate interaction (10 to 30 sec.), responds to some questions in greater detail than necessary.	Long interaction (more than 30 sec.), consistently responds to questions in greater detail than necessary.	Long interaction (more than 30 sec.), initiates detailed, and unnecessary, conversations with customers.
Quality of information	Greets customers and indicates appropriate directions. Uses map or other available materials effectively. Consistently follows-up as needed.	Greets customers and indicates appropriate directions. Uses map or other available materials effectively. Usually follows-up as needed.	Greets customers and indicates appropriate directions but does not follow-up as needed. Relies on pointing rather than using map or other available materials.	Greets customers, but does not indicate appropriate directions or follow-up as needed.	Does not greet or interact with customers.

Intensive Customer Service Training Module

	Excellent	Good	Fair	Poor	Very Poor
Eye-contact	Initiates eye-contact with customer. Sustains eye-contact both at the beginning and at the end of the interaction. Moderate to high levels of eye-contact throughout interactions.	Sustains eye-contact with customer both at the beginning and at the end of the interaction. Moderate to high levels of eye-contact throughout interactions.	Brief eye-contact with customer both at the beginning and at the end of the interaction. Low to moderate levels of eye-contact throughout interactions.	Brief eye-contact with customer either only at the beginning or only at the end of the interaction. Low levels of eye-contact throughout interactions.	No eye-contact with customer at any time during interaction.
Facial Expression	Staff member shows a genuine smile both at the beginning and during the interaction. Does not need to smile throughout interaction to qualify for this rating.	Staff member shows a genuine smile at the beginning or during the interaction.	Staff member shows a fake smile (lower facial muscles only), but does not smile genuinely during interaction.	Staff member has a neutral facial expression, or frowns/sneers while looking down or away. Does not smile at any time. Inappropriate smile during interaction.	Staff member frowns/sneers directly at customer and does not smile at any time. Inappropriate smile throughout interaction.
Body language	Throughout interaction: head is at neutral position, shoulders and arms are open.	-or most of interaction: head is at neutral position, shoulders and arms are open.	Head tilted down or shoulders hunched, but arms are not crossed before and during interaction.	Somewhat withdrawn from the customer: head tilted down, shoulders hunched, and arms crossed before and during interaction.	Withdrawn from the customer: turned away before and during interaction.
Personal appearance	Dress is clean, tidy, and appropriate. No gum chewing.	Dress is appropriate, but either slightly dirty or disheveled. No gum chewing.	Dress is appropriate but obviously dirty or disheveled. No gum chewing.	Dress is appropriate but both dirty and disheveled. Gum chewing receives Poor rating.	Dress is not appropriate. Body odor, if detected, receives Very Poor rating.
Availability	Regularly circulates through the section and scans for questions.	Occasionally circulates through the section and scans for questions.	Circulates through the section but does not scan for questions.	Stays in one location and does not scan the section for questions. Engaged in conversation with another staff member/cell phone or other library activity.	Not visible to customers. Unequal attention to some customers over others.
Needs Assessment	Consistently identifies customers in need of assistance. Listens to customers' questions and asks open-ended questions to identify need.	Occasionally identifies customers in need of assistance. Listens to customers' questions and asks open-ended questions to identify need.	Listens to customers' questions and participates in identifying need.	Listens to customers' questions, but does not attempt to identify need.	Does not listen to customers' questions or attempt to identify need.
Quality of information	Resolves customers' questions, teaches skills to foster independent library use, and shares additional information and resources.	Resolves customers' questions and teaches skills to foster independent library use.	Resolves customers' questions but does not teach skills to foster independent library use.	Does not resolve customers' questions or share additional information.	Does not resolve customers' questions or share additional information. Interact is dismissive, negative, or rude.
Outcome	No signs of confusion, question is resolved. Customer is definitely satisfied.	No signs of confusion, question is resolved. Customer appears somewhat satisfied.	No signs of confusion, question is resolved, but customers' reaction is neutral.	Customer appears confused, question is not resolved.	Customer is visibly upset and confused, question is not resolved.