

**TRAINING
LEADERS
GUIDE**

*The Secret: Customer
Service Uncovered*

© MCMXCVI By Coastal Training Technologies Corp.

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Introduction to *The Secret: Customer Service Uncovered*

Session Synopsis:

In today's increasingly competitive marketplace, one key to gaining an edge over your competition is the quality of your customer service. Outstanding customer service and customer relations play an increasingly important role in how we do business.

Customers want quality. Customers want commitment. Customers want respect.

As sales personnel and customer service representatives, your participants need to provide all three to their customers. In this session your participants will learn the skills that will allow them to provide excellent customer service to every customer, every time.

Training Benefits:

Upon completing this training session, your participants will be able to:

- motivate themselves about serving customers.
- see customer service from the customer's perspective.
- respond honestly to customer needs.
- handle difficult customer problems.
- build customer relationships.

Training Session Planning Considerations

√ Know your audience...

...because different people have different needs. A **Pre-training Survey** is provided on page 12 to help you discover what those needs are and what questions participants may have about customer service.

√ Develop specific objectives...

...that focus on the needs of your organization and your participants. Objectives can keep your session on target and help you meet your training goals.

√ Preview all materials twice...

prior to planning your training session. The more familiar you are with the material, the more comfortable you will become in planning your training session. With proper preparation, the session can be more enjoyable for you and more meaningful to your participants.

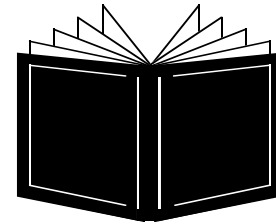
√ Decide on an agenda...

...for your training session. Suggested agendas have been placed in this guide for your benefit. You may be able to use one of them in its entirety, or you may want to add your own ideas. See page 8 for suggested agendas and page 9 for a blank agenda that you can use to develop your own.

√ Properly reserve all training aids,...

...and make sure they are in excellent working condition. The **Training Session Checklist** on page 14 is available to assist you.

Trainer's Instructions on Using the book *Customer Service Excellence*



*Customer
Service
Excellence*
by
Debra J.
MacNeill

Trainer's Note:

Throughout this guide, we have included several exercises from *Customer Service Excellence*. This book is part of American Media's How-To Book Series.

Written in a user-friendly, easy to understand style, *Customer Service Excellence* includes interactive exercises in each chapter to help the reader process the information and put it into action — ensuring that your training makes an impact.

Customer Service Excellence may be used in several different ways that complement your training session. You can use the exercises we have developed for this course, incorporate other exercises from the book that you feel better meet the needs of your organization, or use a combination of both. You may decide to assign reading of an entire chapter of the book that covers an area you wish to emphasize in your session. Or assign reading of the entire book and completion of assigned exercises.

Providing copies of the book to each participant allows you to continue instilling the importance of outstanding customer service after your session is completed. The book is an excellent tool for continued learning and provides an easy, hands-on reference for use on the job.

Order copies for all your attendees today.

Tips for Training the Adult Learner

Trainer's Note:

The following are tips to keep in mind when conducting training with adults. You may wish to review these tips and incorporate them into the planning of your session.

1. Adults learn when they feel they need to.

Discuss ways your training will help participants improve job performance and job satisfaction.

2. Adults learn by doing.

Use the exercises found in this *Course Materials Guide*, or create your own to give participants an opportunity to practice skills they can take back to their jobs.

3. Adults learn by solving realistic problems.

Discuss and analyze actual on-the-job examples. Allow the trainees to solve these real-life problems by using what they have learned.

4. Adults learn in an informal environment.

Design your training room to be as informal as possible. Avoid classroom-style seating. If appropriate, encourage training participants to wear casual clothing. Encourage discussion and interaction by participants to make them feel more comfortable.

5. Adults learn by different training methods.

Vary the training methods you use. Combine discussions, role plays, case studies, self-evaluations, and action planning in your training session. Using a variety of methods reinforces your message, and promotes involvement by your audience.

Possible Session Agendas

Trainer's Note:

Two session agendas have been provided to help guide you through your *The Secret: Customer Service Uncovered* training session. You can modify these agendas to meet the needs of your participants. A blank agenda sheet is also provided on page 9 if you wish to create your own agenda.

2-Hour Session

	<u>Activity</u>	<u>Time</u>	<u>Page Number</u>
1.	Introducing the Session to Participants	5 Minutes	15
2.	Self-Assessment Exercise from <i>Customer Service Excellence</i>	10 Minutes	17
3.	Customer Service Video Presentation and Discussion	30 Minutes	19
4.	Know Your Product Exercise	30 Minutes	20
5.	Case Study Exercises	30 Minutes	29
6.	It's Up to You... Exercise	15 Minutes	41
7.	Session Evaluation Form	5 Minutes	49

4-Hour Session

	<u>Activity</u>	<u>Time</u>	<u>Page Number</u>
1.	Introducing the Session to Participants	5 Minutes	15
2.	Self-Assessment Exercise from <i>Customer Service Excellence</i>	10 Minutes	17
3.	Customer Service Video Presentation and Discussion	30 Minutes	19
4.	Know Your Product Exercise	30 Minutes	20
5.	Never Let the Customer Walk Away with a Problem Exercise	20 Minutes	22
6.	Dealing with Anger Role Play Exercise	30 Minutes	24
7.	What Happened...? Exercise from <i>Customer Service Excellence</i>	20 Minutes	27
8.	Case Study Exercises	40 Minutes	29
9.	It's Up to You... Exercise	15 Minutes	41
10.	Role Play Exercises	30 Minutes	43
11.	Post-training Survey Exercise	15 Minutes	46
12.	Session Evaluation Form	5 Minutes	48

These suggested times are approximate and may vary depending on the needs of your organization and the number of participants in attendance.

Trainer's Personalized Session Agenda

Trainer's Note:

You may want to plan a session that is different than the agendas provided on page 8. Below is a blank agenda to assist you in outlining your session.

	Activity	Time	Page
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Invitation Letter to Participants

Trainer's Note:

This letter can be sent to your participants approximately one to two weeks prior to your training session. Modify the letter to fit your specific needs.

(today's date)

To: (Participant's Name)

From: (Trainer's Name)

Re: *The Secret: Customer Service Uncovered* Training Session

On (insert date), we will be holding a training session to learn more about providing outstanding customer service. The session will be held at (insert location). During the session you will learn how to:

- motivate themselves about serving customers.
- see customer service from the customer's perspective.
- respond honestly to customer needs.
- handle difficult customer problems.
- build customer relationships.

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

Please mark your calendar so you can attend this very important training session.

Thanks!

WORKSHEET

Pre-training
Survey



Trainer's Instructions for the Pre-training Survey

Trainer's Note:

Pre-training questions are located on the following page to enclose with your invitation letter. An assessment such as this can be a valuable tool as you prepare for your session, allowing you to concentrate on the particular needs of the participants, as well as providing a base for which to determine transfer of information after your training session.

Trainer's Instructions:

1. Complete the **Invitation Letter to Participants** (page 10), and enclose a copy of the **Pre-training Survey** (page 12) with each letter.
2. Upon receiving the **Pre-training Surveys** prior to the session, read through them and look for potential questions, problems, or situations to highlight and discuss in your training session.
3. The **Pre-training Survey** can help you focus the training session on your participants' needs. You may wish to add or delete items in your training session depending on the needs of your participants.
4. A **Post-training Survey** is provided on page 48 for use after your session. Evaluating the **Post-training Survey** and **Pre-training Survey** can help you determine if the information presented was transferred to the learner.

Pre-training Survey for *The Secret: Customer Service Uncovered*

INSTRUCTIONS:

Read each question and write or choose your answers in the space provided. Be prepared to discuss your answers at the training session. This survey is a learning exercise. Your answers will not be held against you during the session.

1. What is the most important factor in providing outstanding customer service?

2. All customer service interactions should prove to the customer that you:
 - A. Care about the sale
 - B. Care about the customer
 - C. Can perform your duties quickly
 - D. All of the above

3. When handling a customer problem, your response should always indicate to the customer that "I'm interested and I'm here to help." **True or False?**

4. On slow days you can improve your skills by:
 - A. Making phone calls to your customers.
 - B. Writing notes to your customers.
 - C. Learning more about your customers.
 - D. All of the above.

5. When dealing with an angry customer you:
 - A. Explain that the problem is not your fault.
 - B. Tell the customer to talk to your supervisor.
 - C. Tell the customer that you understand and will try to help.
 - D. Tell the customer there is nothing you can do.

6. It is best to service better-dressed customers first as they are likely to spend more money with your organization. **True or False?**

7. Is it important to have your own personal vision statement? If so, should your vision statement guide you in how you want to be and act on the job? Provide your answer below:

Commitment From the Top

Time Required:

- Not applicable

Materials Needed:

- Training Objectives Overhead 1

Objective

- To include members of the management team in your session to emphasize your organization's commitment to providing quality customer service.

Trainer's Note:

Having your organization's management team involved in customer service training shows your participants that your organization is committed to providing the best service possible.

Trainer's Instructions:

1. Two weeks prior to the training session invite key members of your management team to stop by your training session. Provide them with the date and starting time for the session.
2. Ask the managers to speak to your participants about the service visions of the organization, or to participate in a few of the exercises or discussions.
3. You may also have these managers conduct a discussion on the training objectives for the session. Remember to provide the objectives to the attending managers prior to the session so they will be familiar with your goals and direction. A **Training Objectives** overhead is available in the *Overhead Section* if you choose to train in this manner.

Show & Review Overhead:



Training Session Checklist for *The Secret: Customer Service Uncovered*

Trainer's Note:

This checklist should be used before your training session to secure all logistical items.

Location:

- Create a relaxed environment
- Make sure that all seats have a good view of the visuals
- Make sure there is enough light to take notes when participants view the video
- Provide an adequate writing surface for participants
- Assure good acoustics
- Assure that your room is accessible and equipped for participants with disabilities

Video Equipment:

- Make sure the VCR is properly connected to the monitor
- Test the VCR, and check monitor for proper picture, color, and volume
- Make sure the tape is rewound and ready to play before beginning your session
- Check all other equipment for proper operation

Materials:

- Course Materials Guide*
- Videotape
- Overheads
- Paper and Pencils
- Additional Equipment
- Participant Worksheets
- Copies of the book *Customer Service Excellence* for each participant

Introducing the Session to Participants

Time Required:

- 5 minutes

Materials Needed:

- Overhead 1

Objective:

- To familiarize your participants with the subject matter and goals of the session.

Read or Paraphrase:

Today we are going to discuss key customer service skills and try to find the secret to providing the best possible service to our customers. Some of the information will be new to you while other things may be a review of the basic skills you already know. The key is to learn and review these basic skills because they will move you down the road to success.

Show & Review Overhead:**KEY POINTS TO DISCUSS FROM OVERHEAD 1**

Upon completing this training session, you should be able to:

- motivate yourself about serving customers.
- see customer service from the customer's perspective.
- respond honestly to customer needs.
- handle difficult customer problems.
- build customer relationships.

Stump the Trainer

Exercise

Time Required:

- Not applicable

Materials Needed:

- Flip Chart
- Prize for participant who stumps the trainer

Objective:

- To increase participation by the group in the training session.

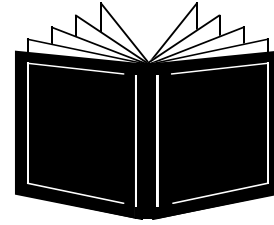
Trainer's Instructions:

1. Set up a blank flip chart in the front of your training room with plenty of blank pages.
2. Ask participants throughout the session to come up with questions that can "stump" the trainer on the session topic. When a question that you cannot answer is presented, place that question on a flip chart.
3. The trainer has the entire training session to come up with the answers to the participants' questions.
4. Whoever ends up stumping the trainer gets a prize at the end of the session (i.e., coffee cup, motivational material, candy, free lunch, etc.).

Trainer's Note:

This exercise encourages participants to constantly challenge their thoughts and ideas on the subject at hand, and to pay close attention to the material in order to come up with challenging questions. These questions may also help the trainer identify the needs of participants relating to the subject of customer service.

Self-Assessment Exercise from *Customer Service Excellence*



*Customer
Service
Excellence*
by
Debra J.
MacNeill

Time Required:

- 10 minutes

Materials Needed:

- Copy of the book *Customer Service Excellence* for each participant

Objective:

- To have participants assess their own customer service skills and to increase their focus on the session's goals.

Trainer's Instructions:

1. Have participants turn to the **Self-Assessment** page in the front of the book prior to the Table of Contents.
2. Give participants five minutes to complete the assessment.
3. Once completed, let participants know that these customer service issues will be discussed throughout the session, and to pay close attention to "weaknesses" they may have in order to improve their skills.

Customer Service Secrets

Exercise

Time Required:

- 20 minutes

Materials Needed:

- None

Objective:

- To get participants to evaluate the most important skills for customer service.

Read or Paraphrase:

We will talk a lot today about customer service and the many aspects for providing outstanding service. But for now, let's take some time to find out what you think are the most important aspects to customer service.

Trainer's Instructions:

1. Break participants into groups of four.
2. Ask each group to spend the next 10 minutes answering the question,

“What is the single most important secret to providing outstanding customer service?”

Participants should be prepared to explain their answers.

3. After 10 minutes, ask a representative from each group to share responses.

Read or Paraphrase:

All of your answers, while different, show one common element. They all show the customer that **YOU CARE** about them, and not just about the sale.

The Secret: Customer Service Uncovered

Video Presentation and Discussion

Trainer's Instructions:

Time Required:

- 30 minutes

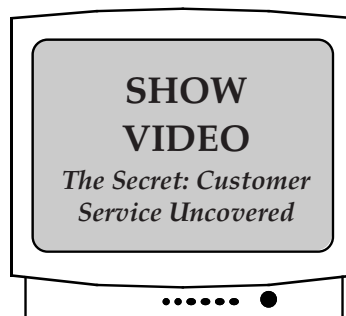
Materials Needed:

- Video, *The Secret: Customer Service Uncovered*

Objective:

- To emphasize the necessary skills for customer service and to discuss how the video's points work in the participant's own work environment.

Introduce and show *The Secret: Customer Service Uncovered* video to participants.



1. After viewing the video, ask participants to break into groups of four.
2. Have each group describe their understanding of the customer service skills presented in the video.
 - Have each group evaluate the video in terms of their own experiences (do the situations presented in the video happen or matter in their work environment?).
 - How do they see the skills presented in the video working or not working in their organization.
3. After 8 minutes ask each group to share their reactions to the audience as a whole.

Know Your Product

Exercise

Time Required:

- 30 minutes

Materials Needed:

- 3 x 5 Cards

Objective:

- To familiarize participants with your company's products.

**Read or
Paraphrase:**

This is an exercise to test your knowledge of our company's product features. The more we know about the products and services we offer, the better customer service we can provide.

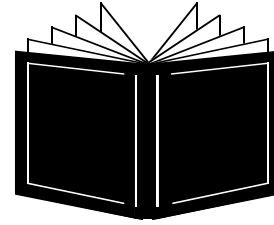
**Trainer's
Instructions:**

1. Prior to the training session, create 3 x 5 cards with your organization's products or services on one side and the features of those products on the other side. For example, if your organization sells office products, staplers would be listed on one side with the features of the staplers you carry on the other. List only one product or service on each card.
2. Divide the room in half with one side of the group being Group A and the other side being Group B.
3. Show the first product or service on the card to both groups.
4. Ask both groups to discuss the product on the card and to create a list of the features of the product or service on a blank sheet of paper.
5. Set a time limit that is attainable but challenging.
6. When the time is up, the group that has listed the most features wins the card. Share with the group all the features listed on your card.
7. Continue until all cards are awarded. The team with the most cards at the end of this exercise "wins." Consider some type of reward for the winning team.

**Read or
Paraphrase:**

This exercise has helped us all increase our knowledge about our company's products. The better we know our own products, the better we will be able to answer our customer's questions and meet their needs.

Features & Benefits Exercise from *Customer Service Excellence*



*Customer
Service
Excellence*
by
Debra J.
MacNeill

Time Required:

- 20 minutes

Materials Needed:

- Copy of the book *Customer Service Excellence* for each participant

Objective:

- To learn to assess the features and benefits of different products.

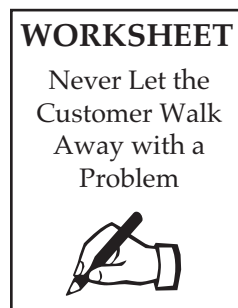
Trainer's Instructions:

1. Have participants turn to page 37 in their *Customer Service Excellence* book, and begin reading the section entitled "What Are The Features And Benefits?"
2. Give them ten minutes to read pages 37 through 38, and then have them complete the exercise on page 39.
3. Once all participants have completed page 39, discuss the different products/services they have listed and their specific features.
4. Once all features have been discussed, ask your participants to come up with the benefits that each feature creates for a customer.

Never Let the Customer Walk Away with a Problem Exercise

Read or Paraphrase:

Trainer's Instructions:



Show & Review Overhead:



Read or Paraphrase:

Time Required:

- 20 minutes

Materials Needed:

- One copy of the **Never Let the Customer Walk Away with a Problem Worksheet** for each participant (page 23)
- Overhead 2

Objective:

- To learn skills to service angry customers or customers with a problem.

When a customer has a problem, it's our job to listen and solve the problem. There is nothing more frustrating than a customer service individual who appears disinterested and uncaring.

1. Distribute the **Never Let the Customer Walk Away with a Problem Worksheet** to all participants.
2. Ask each participant to review the typical customer concerns described on the worksheet and formulate a statement that tells the customer, "I'm interested and I'm here to help."

EXAMPLE:
MISSED DELIVERY.

I'm sorry your merchandise wasn't delivered on Friday, Mrs. Jones. I understand how you feel, staying home from work all day waiting for the delivery. I know I hate feeling as if I've wasted my time.

Let's see if we can find out what happened."

3. Display Overhead 2 throughout the exercise to remind participants of the message they want to convey in their responses to customers.
4. After participants have completed the exercise, discuss answers as a group.

This exercise should teach us the importance of being honest with customers, being sympathetic with their problems, and willing to work with them to solve those problems.

Never Let the Customer Walk Away with a Problem Worksheet

INSTRUCTIONS:

Review the typical customer concerns described below and formulate a statement that tells the customer, ***“I’m interested and I’m here to help.”*** Be prepared to discuss your answers after you are finished.

1. Customer bought an item yesterday. It went on sale today.
2. Customer is unhappy about the “rude” treatment she received in another department in your organization.
3. Customer is concerned about the length of time he’s had to wait.
4. Customer dislikes the quality of the merchandise or service he has received.
5. Customer is unhappy about an error your organization has made in billing her account.

Dealing with Anger Role Play

Exercise

Pre-training Session Preparation:

Time Required:

- 30 minutes

Materials Needed:

- One copy of the **Observer's Guide Worksheet** for each participant (page 26)

Objective:

- To learn and practice the correct techniques for handling angry customers.
1. Two weeks prior to the training session send a memo to the supervisor or manager of each of the employees attending your session. Ask for their help in making the training session more beneficial. In your memo, ask the manager or supervisor to provide you with a description of a realistic situation where a customer is angry and the employee will need to solve the problem. Explain to the supervisor that this information will be used to provide the employee practice in handling angry customers during the training session.
 2. Upon receipt of the description, read through it to make sure it will be understandable by other participants in the training session.
 3. After you are sure it will be understandable, place the description in an envelope and mark the envelope with the participating employee's name on the outside.
 4. Make enough copies of the **Observer's Guide Worksheet** so that each participant can have a copy.

Dealing with Anger Role Play

Exercise *(continued)*

Trainer's Instructions:

1. At the appropriate time in your session, tell participants that they will now be offered the opportunity to practice handling an angry customer.
2. Ask participants to form groups of three. During the role-playing exercise, one person will act as the **customer**, one will be the **employee**, and the third person will be an **observer**. Remind participants that the purpose of the exercise is to offer an opportunity to practice their skills in a controlled environment.
3. Hand out the envelopes containing the angry internal customer situations to each participant (participants should receive the envelope with their name on it). Tell them that when it is their turn to be the **employee**, they should hand the envelope to the participant playing the **customer**. Tell the participants playing the **customer** to open the envelope and review the description so they can be an authentic angry customer.
4. Have the participants talk with each other as if it were a real situation. Urge the participants who are role playing the **customer** to act angry with the situation.
5. Give each participant a copy of the **Observer's Guide** on the next page. Tell them to fill the sheet out during their turn as an **observer**, and that after the role play is completed, they should comment to the **employee** on how the situation was handled.
6. Have participants switch roles and complete the role plays, until each individual has been allowed to practice each situation.
7. Ask for volunteers to share their observations as you discuss each question on the **Observer's Guide**.

WORKSHEET

Observer's
Guide
Worksheet



Dealing with Anger Observer's Guide

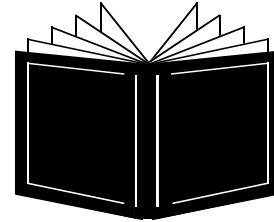
Worksheet

INSTRUCTIONS:

As an **Observer**, your role is to observe the other participants during the role playing and record your observations. After the role play, you should be prepared to discuss your observations with the **Employee**.

1. Did the employee gather as much background information as he/she could?
What methods were used to gather information?
2. In what ways did the employee show concern and an attitude of caring for the customer?
3. What listening skills were used by the employee? Was the customer allowed to vent?
4. How did the employee summarize the problem and what feedback did the employee give the customer?
5. What plan of action was developed? Was the plan acceptable to the customer?
6. What alternatives were presented to the customer?

What Happened...? Exercise from *Customer Service Excellence*



*Customer
Service
Excellence*
by
Debra J.
MacNeill

Time Required:

- 20 minutes

Materials Needed:

- Copy of the book *Customer Service Excellence* for each participant

Objective:

- To have participants evaluate their own skills in handling a difficult customer in an actual situation.

Trainer's Instructions:

1. Have participants turn to page 78 in their *Customer Service Excellence* book.
2. Have participants remember the last difficult customer encounter they experienced, and give them ten minutes to read the bottom of page 78 (**Examine What Happened**) and complete the review sheet on page 79.
3. Once all participants have completed the review sheet, ask for volunteers to share their answers as you discuss each impression.

Motivation on Slow Days

Exercise

Trainer's Instructions:

Time Required:

- 10 minutes

Materials Needed:

- Flip Chart

Objective:

- To learn how to motivate oneself on slow days to help future sales.

1. Divide your participants into small groups of four to six people.
2. Ask participants to brainstorm ways to increase sales and improve their customer service and sales techniques on **SLOW DAYS**.

(Possible Ideas)

- Create your own sales traffic by making phone calls or writing notes to your customers.
 - Learn more about your merchandise.
 - Check supplies.
 - Recheck the location of stock.
3. Ask group members to share their ideas, and place these ideas on a flip chart.
 4. During the discussion, your participants may have thought of additional sales issues they would like to discuss. Ask for additional comments or questions.

Case Study Exercises

Time Required:

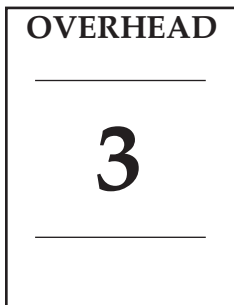
- 40 minutes

Materials Needed:

- Customer Service Case Studies (pages 29 – 38)
- Overhead 3

Objective:

- To help participants practice realistic customer service situations.

Trainer's Instructions:**Show & Review Overhead:**

1. Divide your participants into teams of four. Explain that they will be reading case studies in which characters face customer service situations.
2. Choose at least four of the following case studies for use in this session. Have participants read the first case study in its entirety.
3. Then ask the small groups to think about how to properly handle the situation, and to be prepared to discuss their thoughts.
4. After five minutes, ask one person from each group to explain their answers.
5. Continue this process for each case study.

Trainer's Note:

To greatly enhance this exercise, ask questions for each case study that relate the situation to your organization. You may also wish to have participants volunteer to act out the case studies and have audience members give feedback on possible ways to handle each situation.

Customer Service Case Study 1—

HOTEL LOBBY AREA

We are in a huge hotel where we see an Arabic woman dressed in cultural wardrobe wandering in a hotel lobby. She stops to look for someone who might help her. She sees a young bell clerk, and in a hard to understand accent quietly asks:

ARABIC WOMAN

Pardon. Could you please direct me to the gift shop?

The bell clerk barely looks up and makes little attempt to try and understand what the woman is saying.

BELL CLERK

Excuse me?

The woman very slightly raises her voice and lowers her eyes. She has cloth that covers her mouth, which contributes to the fact that she is difficult to understand. With a heavy accent she repeats her question.

ARABIC WOMAN

Could you please direct me to the gift shop?

The bell clerk nervously responds.

BELL CLERK

Ah, I'm not sure where that is.. (His volume goes up and his speech slows down)

Guest Services might be able to help you (he points).

The bell clerk looks as puzzled as the Arabic woman. She is out of her element and confused. The Arabic woman wanders a short distance and sees another hotel employee nearby to whom she repeats her request.

ARABIC WOMAN

Please, could you direct me to the gift shop?

HOTEL EMPLOYEE

Huh?

HOW COULD YOU HANDLE THIS SITUATION?

Customer Service Case Study 2—

CUSTOMER SERVICE CENTER

Several people are on the phones taking service calls. The phone rings and a young male, John, answers the phone. John is very pleasant. There is a smile in his voice.

JOHN

Good morning, Allen's Customer Service. How may I help you?

MRS. RONE (Yelling)

Yes. I was told to expect delivery on my order in three to four weeks. I called two weeks ago, and you people said it's only week three – wait another week. Well, it's week five, and still no delivery.

John quickly asks for more information.

JOHN

Ahh. Can I have your name?

MRS. RONE

Rone, Beth. Order number 456878.

John reports the customer information. His tone is neither negative or positive.

JOHN

Well, my record shows that your order is scheduled to be put on the truck next Friday. Then it should get to you in no more than a week from then...

Mrs. Rone doesn't like the answer.

MRS. RONE

That's ridiculous. That's almost seven weeks from the time I ordered. You said three to four weeks. It's unacceptable. And I'd like...

John interrupts and starts to argue a point with Mrs. Rone.

JOHN

Ma'am, I didn't say three to four weeks. I'm just trying to help you.

John's comment has angered her more.

HOW COULD YOU HANDLE THIS SITUATION?

Customer Service Case Study 3—

FAST FOOD COUNTER

Mrs. Davis, an elderly woman, is placing her order in a crowded fast food restaurant. A young, fast-moving worker, Andrea, is her server.

ANDREA

Welcome. What can I get you today?

MRS. DAVIS

I'd like a hamburger with mustard, pickles, no mayonnaise or ketchup, please. Oh, and a coke.

ANDREA

Small, medium, or large?

Mrs. Davis thinks a moment. Andrea is getting impatient. She wants to move quicker than her customer does.

MRS. DAVIS

Oh, I don't know. What are the sizes like?

Andrea grabs the cups and sarcastically points them out. Mrs. Davis is still very pleasant, yet slow.

ANDREA

This is small, medium, large.

MRS. DAVIS

Medium, please.

Andrea tries to wrap it up.

ANDREA

Is that all?

Mrs. Davis studies the menu and finally says:

MRS. DAVIS

Uh, apple pie, warm, not hot.

Again, Andrea tries to wrap things up.

ANDREA

Is that all?

(...continued on next page)

Customer Service Case Study 3— (continued)

MRS. DAVIS

Yes, I think so. Could you read that back to me?

Andrea rolls her eyes and does as asked, quickly.

ANDREA

Hamburger, mustard, lettuce, medium coke, apple pie warm, not hot.

MRS. DAVIS

Fine, thank you. And how much will that be?

ANDREA

\$4.32. To go or for here?

The worker says “to go or for here” so fast, it sounds foreign to Mrs. Davis.

MRS. DAVIS

Excuse me?

Andrea now talks extremely slow and loud.

ANDREA

Did you want that to go or for here?

Mrs. Davis answers but is becoming rampantly aware of how rude this woman is...
But she maintains her politeness.

MRS. DAVIS

Here, please.

The fast worker is gone and running. While Mrs. Davis is getting out her money, her daughter walks up next to her.

DAUGHTER

How ya doing, Mom?

MRS. DAVIS

Fine. This place has rude people, though.

HOW COULD YOU HANDLE THIS SITUATION?

Customer Service Case Study 4—

BANK INTERIOR

Sandy, a young mother, comes through the front door carrying a large glass container filled to the brim with coins. She has two small children that are keeping her busy, as well. She patiently waits in line with her children and her coins. Another person stands in line behind her. The customer before her leaves...

TELLER

Hello, how may I help you?

SANDY

I'd like to cash these in...

She puts the coins on the teller counter. As she does, her son, Jack, yanks free.

SANDY

Jack. Jack. Come back here.

The teller waits patiently to ask her a question.

TELLER

Can I have your account number?

SANDY

Oh, I just wanted to have my change run through one of those machines (points).
(To her son) Settle down!

TELLER

I can only do that if you have an account here.

SANDY

You're kidding.

The young mother tries to save the moment. She shyly adds...

SANDY

My mom banks here.

TELLER

I'm sorry, that's our policy.

Kids are causing a complete ruckus below. Woman behind the young mother looks as put out as the young mother does. They exchange annoyed glances regarding the bank's policy.

SANDY

(walking out of the bank) I'm sorry, too.

HOW COULD YOU HANDLE THIS SITUATION?

Customer Service Case Study 5—

RETAIL OUTLET MAKE-UP COUNTER

Two saleswomen are talking behind their counter. They have no customers to wait on, but are chatting about their day.

CLERK #1

This morning I had a customer with the worst complexion I have ever seen.
Poor woman.

CLERK #2

Yuck.

A customer walks up and begins browsing.

CLERK #2

Hi there. Can I help you with something today?

CUSTOMER

No thanks, just browsing.

The two clerks smile and then continue talking.

CLERK #1

I started her on the sensitive skin program, but I probably should of recommended that she talk to a dermatologist first.
I mean this woman had a serious problem. It was gross.

CLERK #2

Did I tell you about the guy who stopped by yesterday? He wanted something to make his wife's cellulite go away.

CLERK #1

You're kidding.

The customer has been eves dropping on the conversation. She's not upset by it, but is not impressed, either.

CLERK #2

No. And he described her thighs to me.

HOW COULD YOU HANDLE THIS SITUATION?

Customer Service Case Study 6—

HOTEL

Two custodial employees are walking down the hall of their hotel on the way to a customer's room. They are laughing and having a good time.

JIM

I can't believe you did that.

The two men are teasing each other and laughing.

FRANK

It wasn't that bad.

Whatever happened was too good for Jim to let go and he pushes it further.

JIM

You are spastic, you know that?

Frank is laughing and tells Jim to shut up in a way that is friendly, not hostile.

Jim starts imitating someone with a severe disability as they continue to walk down the hall. As Jim throws his arms around and drags his feet, Frank continues to laugh.

As they pass the ice and vending room, they fail to see Dianne, a disabled guest in a wheelchair. She looks right at them the moment Jim is imitating a disabled person. She looks saddened by the imitation. We can tell by her nonverbal language that this has left a bad impression with her.

**HOW COULD YOU
HANDLE THIS SITUATION?**

Customer Service Case Study 7—

RETAIL STORE – RETURN DESK

There are several people in line to return items. Brenda, the customer service representative, is busily helping people with their return items. Mrs. Wallaby, an older sweet-looking woman, is next. Behind her is Lamont, an African American male, late twenties, wearing an ethnic hat and sports jacket.

BRENDA
(smile) How can I help you?

Brenda smiles as Mrs. Wallaby explains.

MRS. WALLABY
I'd like to return this coffee maker. My grandson gave it to me and I didn't have the heart to tell him that I just don't drink coffee anymore.

Lamont is also catching this conversation and he can't help but smile.

BRENDA
(nurturing) Do you have your receipt?

MRS. WALLABY
Oh no, I wouldn't think of asking him for it.

BRENDA
(Laughs as if she understands) Then I'll just need you to fill out this form – sections one through five. And I'll also need a picture I.D. (pleasantly) Did you want cash or in-store credit?

Lamont chuckles again. He looks impressed with how Brenda is handling the situation with Mrs. Wallaby.

MRS. WALLABY
Cash, thank you, dear.

Lamont walks up to the counter and pulls out a pair of sunglasses, with the tags still on. Brenda's face changes as she looks from the glasses to Lamont.

Customer Service Case Study 7— *continued*

BRENDA

(coolly without much personality) How can I help you?

LAMONT

I'd like to return these. My wife hates them.

BRENDA

(flatly) Do you have your receipt?

LAMONT

I'm sorry, I put it somewhere I wouldn't forget, and what happens?

Don't you know, I can't find it.

BRENDA

(a slight tone of disapproval) Then I'll just need you to fill out this form – sections one through five.

BRENDA

(firmly) And also, a picture I.D. (a slight emphasis on the word cash) Did you want cash or in-store credit?

Lamont looks at her a moment, confused, then more angrily. He shakes his head.

**HOW COULD YOU
HANDLE THIS SITUATION?**

Customer Service Case Study 8—

DOWNTOWN BANK

From the inside, we see a man outside walking toward the entrance of the bank. He appears to be a homeless person – ragged clothes, dirty, bearded, and worn. His gate is broken and slow.

The man opens the door and enters the bank, heading toward a teller. He passes a front security man, who clearly notices his presence. The security man stops what he is doing and stares unpleasantly. He does not like this man in his bank.

The man glances to the side and notices the unpleasant stare of the security man, but continues on. He passes a few desks of loan officers on his way to the tellers. One woman loan officer notices the man and throws a paper clip at another woman to get her attention, and points to the man. They laugh silently and stare.

The man's head drops lower, and he finally finds his way to the teller. He is remotely aware that most people in the bank, including the customers, are looking at him as if he has no right to be there. The man stands behind a customer already being served and patiently waits his turn.

The teller glances around her current customer and stares at the man. She looks afraid.

In a moment, the teller finishes with the customer before the man. As the customer walks away, we see that the security man has made his way behind the teller – standing back – but most definitely there.

The man walks up to the counter and pulls out a twenty-dollar bill.

MAN

I'd like to deposit this.

The teller responds neutrally, not unfriendly, but not friendly, either.

TELLER

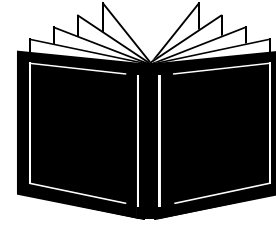
Do you have an account with us?

MAN

Yes, Ma'am. For twenty-eight years.

HOW COULD YOU HANDLE THIS SITUATION?

What About the Telephone? Exercise from *Customer Service Excellence*



*Customer
Service
Excellence*
by
Debra J.
MacNeill

Time Required:

- 20 minutes

Materials Needed:

- Copy of the book *Customer Service Excellence* for each participant

Objective:

- To have participants practice telephone skills when handling customer situations.

Trainer's Instructions:

1. Have participants turn to page 53 in their *Customer Service Excellence* book.
2. Read aloud the section entitled, "What About the Telephone?"
3. Pair participants and ask them to simulate a typical customer service call. One person will be the caller, the other the customer service representative. Some questions might include:
 1. *Do you stock (insert product)?*
 2. *How much is it?*
 3. *Can I have it delivered to my home.*
 4. *What payment options are available.*

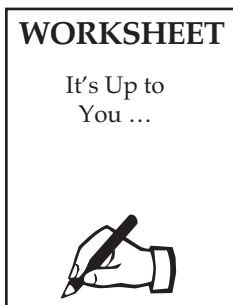
Your participants may come up with other scenarios or frequently asked questions they encounter in their job.

4. After each participant has role-played being both the customer and the Customer Service Representative, ask them to answer the questions found on page 53 and 54 in the book.
5. Once all participants have answered the questions, ask for volunteers to share their answers as you discuss each question.
6. As a large group, continue to read and discuss the rest of page 54 and page 55 on **Telephone Impressions**.

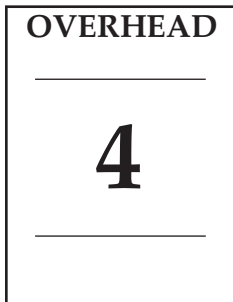
It's Up to You ... Exercise

Read or Paraphrase:

Trainer's Instructions:



Show & Review Overhead:



Read or Paraphrase:

Trainer's Note:

Time Required:

- 15 minutes

Materials Needed:

- One copy of the **It's Up to You ... Worksheet** for each participant (page 41)
- One envelope for each participant
- Overhead 4

Objective:

- To have participants focus on their own personal vision and how that applies to their work environment.

We, as an organization, can establish a customer service vision and list our expectations for service. But it does not mean anything until each of you buys into the vision. Each of you, as individuals, need to establish your own personal vision. Think of it as the movie in your mind. The movie tells the story about how you want to be and act on the job.

1. Hand out the **It's Up to You ... Worksheet** (page 42) and one envelope to each participant.
2. Ask each participant to spend 10 minutes writing the vision they have for themselves. How do they see themselves in their job.
3. When finished ask each participant to place their vision in the envelope, write their name on the front and pass it to the front of the room.

These visions are for you and you alone. You make the choice about the type of customer service you are going to provide. By writing a vision and committing to it you are on your way to excellent customer service. Your vision will be returned to you, unopened, in the next few weeks.

Please refer to the follow-up letter on page 50 for return of the vision statements.

It's Up to You ...

Worksheet

INSTRUCTIONS:

Spend 10 minutes to write down your own personal vision relating to your job. These visions are for you and you alone. When you are finished place your vision in the envelope, write your name on the front, and pass it to the front of the room. It will be returned to you, unopened, in the next few weeks.

VISION:

Role Play Exercise

for the Experienced Sales Person

Trainer's Instructions:

Ask & Discuss: Show & Review Overhead:



Time Required:

- 30 minutes

Materials Needed:

- One copy of the **Role Play Scenarios** for each non-role playing participant
- Overhead 5

Objective:

- To help the experienced salesperson practice actual sales situations.

1. Ask for ten volunteers to participate in a role play. (For smaller groups, you may wish to pick fewer role plays.)
2. Hand out the Role Play Scenarios to the observing audience.
3. Pair the volunteers with one being the customer, and one being the salesperson.
4. Give the role players the appropriate role play description, but do not allow the salesperson and the customer to know each other's role.
5. Instruct participants to use the products they normally sell while participating in this role-play exercise.
6. Remind them to supply their product knowledge in the given situation.
7. Allow five minutes for each of the five role plays.
8. After each role play, ask the remainder of the participants the following questions:

Q. What did the salesperson do well?

Q. How could the salesperson improve?

Role Play Scenarios

Worksheets

ROLE PLAY #1—THE DIFFICULT CUSTOMER

SNODGRASS (Customer)

You are generally a warm, friendly person, but today everything has gone wrong. You enter the store feeling tired, frustrated, and in a hurry. You need to buy a specific item, but you're not sure which brand, style, or color is best. When the salesperson, MASTERS, first approaches, you reject the assistance since you don't have much time.

Q. Can MASTERS convince you that he/she has the knowledge to help you make the correct purchase—or will you leave the store in a rampage?

MASTERS (Salesperson)

You are an experienced salesperson. When SNODGRASS enters the store, you immediately begin the steps to make a sale. The purchase will depend on your ability to gain the customer's trust and remain calm.

ROLE PLAY #2—HANDLING AN OBJECTION DUE TO NEEDS

REINHURST (Customer)

You are shopping when a specific item catches your eye. It isn't appropriate for your needs, so you probably won't buy it. When DAWNLER, the salesperson, approaches, you continue to examine the item with interest. Don't volunteer any information concerning your real needs.

- Q.** Will DAWNLER get you to discuss your real needs?
- Q.** Will you buy the appropriate item?
- Q.** Will you buy an item you may be unhappy with later?
- Q.** Will you leave the store without a purchase?

DAWNLER (Salesperson)

REINHURST, a customer, shows a great deal of interest in one of your more expensive items. You engage in a conversation with REINHURST to attempt to satisfy the customer's needs and make a sale.

- Q.** How will you match the right item with the customer's needs?

Role Play Scenarios

Worksheets *(continued)*

ROLE PLAY #3—HANDLING THE PRICE OBJECTION

HEINS (Customer)

You have been shopping around for a specific item. You enter a store to check their price on this item and you are approached by JUDKINS, a salesperson. The store's price is competitive with other stores you've checked, but you feel the price is still too high. Initially, you object to JUDKIN's attempt to close the sale. You hesitate to tell JUDKINS why you object.

Q. Will JUDKINS convince you that the item is worth the price?

JUDKINS (Salesperson)

HEINS, a customer, enters your store and shows interest in a specific item. You proceed easily through the selling steps and attempt to close the sale. HEINS is reluctant. You must define the specific objection and try to overcome it.

ROLE PLAY #4—CLOSING THE SALE

CARSON (Customer)

You have entered a store to browse around. As you are looking, HENDRICKS, the salesperson, directs your attention to a new item. HENDRICKS talks with you about the item and you become interested. You feel unsure when HENDRICKS attempts to close the sale, since this wasn't an intended purchase.

Q. Will HENDRICKS' closing techniques convince you to buy the new item?

HENDRICKS (Salesperson)

CARSON, a customer, enters your store to browse. You immediately draw the customer's attention to a new item. You must get the merchandise in the customer's hands and continue with the selling steps.

Q. How can you service this customer?

Post-training Survey

Exercise

Read or Paraphrase:

Trainer's Instructions:

WORKSHEET

Post-training
Survey
Worksheet



Time Required:

- 15 minutes

Materials Needed:

- One copy of the **Post-training Survey Worksheet** for each participant (page 48)

This worksheet is designed to evaluate the effectiveness of this training session. In no way will it be used to penalize you.

1. Distribute the **Post-training Survey Worksheet** and give participants time to complete it. Discuss the questions below. Possible answers are provided.
1. What is the most important factor in providing outstanding customer service?
Answers will vary, but all should show that you care about the customer.
2. How should a customer feel after coming to you with a question or problem?
That you are interested and you are here to help.
3. Complete this sentence: All _____ have features, and these features create _____ for the customer.
All products have features, and these features create *benefits* for the customer.
4. What steps can you take on slow days to increase sales and improve your customer skills?
 - **Make phone calls or write notes to customers.**
 - **Check inventory and supplies**
 - **Learn more about your organization's products or merchandise.**
 - **Recheck location of stock.**
5. What is one approach you can take when dealing with an angry customer?
 - **Collect background information on the customer's problem.**
 - **Listen to the customer.**
 - **Let the customer vent**
 - **Show concern and empathy**
 - **Present options and alternatives to the customer**
 - **Develop a mutual plan of action**

Post-training Survey

Exercise (Continued)

6. Why is it important to not let a customer walk away angry?
An angry customer will not return and will tell others of his/her experience with your organization.
7. How should you handle a customer who doesn't seem to fit the profile of your regular clientele?
As if they are as valuable as any other customer.
8. What approach should you use when working with a disabled customer?
Treat equally and as respectfully as you should all customers. Offer to provide any special assistance the customer may require due to his/her disability.
9. Why is a personal vision statement important in business?
A personal vision statement helps you focus on your personal and professional goals, enabling you to excel in your profession.
10. What is one important aspect of your personal vision statement?
Answers will vary by individual

Post-training Survey

Worksheet

INSTRUCTIONS:

The questions listed below highlight key points from your ***The Secret: Customer Service Uncovered*** training session. Consider the questions and write your answers in the space provided.

1. What is the most important factor in providing outstanding customer service?
2. How should a customer feel after coming to you with a question or problem?
3. Complete this sentence:
All _____ have features, and these features create _____ for the customer.
4. What steps can you take on slow days to increase sales and improve your customer skills?
5. What is one approach you can take when dealing with an angry customer?
6. Why is it important to not let a customer walk away angry?
7. How should you handle a customer who doesn't seem to fit the profile of your regular clientele?
8. What approach should you use when working with a disabled customer?
9. Why is a personal vision statement important in business?
10. What is one important aspect of your personal vision statement?

Session Evaluation Form— *The Secret: Customer Service Uncovered*

INSTRUCTIONS:

Please circle the number that best describes your evaluation of the training session.

	Strongly Agree	Agree	Uncertain	Disagree	Strongly Disagree
This training program concentrates on the importance of providing quality customer service.	5	4	3	2	1
This training program helped me identify important customer service skills.	5	4	3	2	1
As a result of this program, I am more confident in MY ability to provide quality customer service.	5	4	3	2	1
The objectives of the program were clearly presented.	5	4	3	2	1
Opportunities to ask questions and discuss issues were sufficient.	5	4	3	2	1
The session was well-organized.	5	4	3	2	1

The best part of this program was: _____

This program could be improved by: _____

Additional comments _____

I would recommend this session to others. (Circle one.) **Yes** **No**

Follow-up Letter

Trainer's Instructions:

The letter below should be personalized and sent to each participant one to two weeks after your training session. By following up in this manner, your participants will have the opportunity to utilize what they learned in their work environment.

(Date)

To: (Participant's Name)

From: (Your Name)

Re: ***The Secret: Customer Service Uncovered*** Training Session

Earlier this month you attended a training session which talked about the importance of customer service. During the training session you learned how to:

- motivate yourself about serving customers.
- see customer service from the customer's perspective.
- respond honestly to customer needs.
- handle difficult customer problems.
- build customer relationships.

Our hope is that you have been able to put the ideas you learned to work within your area. To help with this, we are sending you the vision statement written by you during the course. The vision statement will guide you in improving your own customer service habits and providing quality customer service.

If you have any questions, please contact me at extension (###).



Overheads

Customer Service

TRAINING SESSION OBJECTIVES

- Motivate yourself about serving customers.
- See customer service from the customer's perspective.
- Respond honestly to customer needs.
- Handle difficult customer problems.
- Build customer relationships.

**“I’m interested and I’m
here to help.”**

**How could you handle
this situation?**

**Your personal vision
statement should be a
movie that tells the story of
how you want to be and act
on the job.**

Q. What did the salesperson do well?

Q. How could the salesperson improve?