

CUSTOMER SERVICE

"People perform best and deliver the best customer service, when they like what they do."
-Unknown

CS1

Revision 8.1

Work Certified™ 1.2016

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CUSTOMER SERVICE

MODULE SUMMARY

CS3

Revision 8.1

Work Certified™ 1.2016

CUSTOMER SERVICE MODULE SUMMARY

Title:	Customer Service
Hours:	12 hours
Description:	This module provides students with an awareness of good customer service and how important it is to the success of a business. It further provides training in rudimentary customer service skills.
Objectives:	After completing this course, students will have knowledge of the meaning and importance of customer service from both a business and personal perspective. In addition, the students will know what is expected from them in a work environment from a customer service point of view and will develop some important customer service skills such as active listening, rules for communicating and telephone techniques.
Materials:	A marker board or chalk board, a flip chart (optional), course outline handout, in-class exercises, case studies, and role-playing exercises.
Implementation:	The environment for this course should be informal, allowing for the free flow of discussion and creating a comfortable environment for students to participate openly during in-class exercises, role-playing activities and case studies. The instructor needs to have the ability to elicit participation from all students by creating an environment where students feel compelled to share their thoughts and ideas. A helpful teaching tip is to be non-critical whenever students volunteer comments, looking for the positive in students' responses while remaining on track to get the answers/results that are required by a particular in-class exercise.
Topics:	Good and Bad Customer Service Being Customer focused Customer Service Profitability Identifying Your Customers Customer Service Delivery and Measurements Customer Perceptions Active Listening Barriers to Communication Service Attitude Personal Signals Telephone and Customer Service Techniques
Certification Requirements:	Master all competencies for Customer Service (see CS6) Score 80% or higher on the Work Certified™ Certification Exam

CUSTOMER SERVICE COMPETENCIES

CS-25. Answers a minimum of six questions correctly during class lectures and exercises as evidenced by observation of performance.

CS-26. Demonstrates ability to identify internal and external customers by performing the Who Are Your Customers Exercise and successfully listing at least one external and one internal customer for the job position they are assigned as evidenced by observation of work product.

CS-27. Demonstrates ability to recognize customer needs by participating in module role-plays as observed by instructor.

CS-28. Demonstrates ability to generate practical solutions to customer problems by coming up with at least 1 acceptable recommendation to help resolve the customer complaint in the Custom Rental, Inc./Southside Equipment, Inc. Case Study as evidenced by Q&A.

CS-29. Demonstrates effective use of active listening skills by showing appropriate attention, repeating, and summarizing skills as evidenced by observation of performance.

CS-30. Demonstrates ability to classify comments in order to properly address customer needs by scoring 70% or higher on the Statement/Objection/Question Exercise as evidenced by Q&A.

CS-31. Demonstrates proficiency in identifying statements and words to avoid using when performing customer service functions by scoring 80% or higher on the Statements to Avoid Exercise as evidenced by Q&A.

CS-32. Demonstrates ability to work effectively as a team member as evidenced by observation of performance.

CS-33. Demonstrates knowledge of customer service by achieving a score of 80% or higher on an **online module quiz**.

CUSTOMER SERVICE COURSE OUTLINE

LESSON 1

Course Introduction
Good and Bad Customer Service
Customer Focus
Customer Service Profitability

LESSON 2

Identifying Customers
Customer Service Delivery and Measurements

LESSON 3

Customer Perceptions
Active Listening
Barriers to Communication

LESSON 4

Service Attitude
Personal Signals
Telephone and Customer Service Technique

Customer Service Module Online Quiz

CUSTOMER SERVICE TEACHING PLAN OVERVIEW

LESSON 1

This lesson plan is for three hours. Take two 10-minute breaks at appropriate times.

TOPIC	TIME	COPIES REQUIRED as HANDOUTS
Course Outline & Competencies	10 -15 minutes	Competencies – page CS5 Course Outline - page CS6
Good and Bad Customer Service	10 -15 minutes	Exercise Examples of Customer Services - page CS10
Customer Focus	90 -100 minutes	Customer Focus Exercise - page CS11 Customer-Focused Organization Case Study - page CS12
Customer Service Profitability	40 -45 minutes	Customer Service Profitability Case Study - page CS14-15

CUSTOMER SERVICE TEACHING PLAN LESSON 1

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Course Outline & Competencies	Competencies-page CS5 Course Outline-page CS6	N/A	Review material on these documents.

INSTRUCTOR NOTES:

1. Make sure you go over all competency requirements for this module with the members.
2. A fun way to open the course is to say, “This course has a lot of fun exercises, so I will be referring to my teaching plan to make sure we perform them all in the correct order. I apologize for the inconvenience this will cause you.” Then ask if this was good customer service (it is - no use of “may”).

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Good and Bad Customer Service	Examples of Customer Service - page CS10	N/A	Ask participants to think of some personal examples of good and bad customer service and have them share their experiences with the class. Try to get a couple of good examples of both good and bad customer service. If they are having trouble coming up with some, start by giving an example yourself. Use the handout for the Examples of Customer Service Exercise and ask everyone to write down at least one good and one bad experience. Make sure you use a restaurant example. Bad experience - but what happens if they offer a free meal if you come back? Do you come back? What if they did nothing? Other examples to use: return policies at stores and how it impacts where you buy something; getting a cold call from a charity fund raiser - rude/bad experience on the phone could stop you from talking to any charity that calls.

INSTRUCTOR NOTES:

1. Perform the in-class exercise and provide opportunities for participants to meet their requirement for answering a minimum of 6 questions correctly during classroom discussions. If needed, help guide the class by mentioning specific areas of service such as restaurant service, cable/ phone service, how a recent complaint was handled. Don't forget that product performance also qualifies as a service.
2. In many cases, examples of bad customer service are easier to remember than examples of good customer service. Note this to the class, letting them know that often good customer service is expected and taken for granted. Ask the class if anyone has an example of an incident where they received bad customer service, but then the business corrected or made up for the bad service. You can do this with a new example or ask follow-up questions to a problem already mentioned. In the worst case, use an example that you say happened to you such as a bad meal at a restaurant where they apologized, took off the charge for that dish and asked you to try them again at their expense.

CUSTOMER SERVICE TEACHING PLAN

LESSON 1

3. Inform students studies have been done that show if customer problems are resolved satisfactorily, about 80% continue to do business with the company as if the problem did not happen. What does it all mean? Customer service is really selling, adding to the company's bottom line which keeps everyone employed.

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Customer Focus	Customer Focus Exercise - page CS11 Customer-Focused Organization Case Study - page CS12	Customer-Focused Organization Case Study - page CS13	Customer Focus
Customer Service Profitability	Customer Service Profitability Case Study - page CS14-15	Page CS16-17	Start with this statement, "The reason that businesses put money, manpower and resources into customer service is that superior customer service makes a company more profitable." Distribute the Customer Service Profitability Case Study. Ask the students to read the case study and then ask them to answer the case study questions.

INSTRUCTOR NOTES:

Perform the in-class exercises and provide opportunities for participants to meet their requirement for answering a minimum of 6 questions correctly during classroom discussions. Use the answer keys for the case studies and exercises to be sure you present the pertinent answers. In the case study, show how the individual's results are directly related to the company's profitability. Use the **Customer Service Profitability Case Study Answer Key**. Be sure to stress how, in a manufacturing environment, the reliability of the finished product plays a major role in how the company is perceived; and how manufacturing quality controls dictate the eventual size, role and job of the company's customer service department.

EXERCISE: EXAMPLES OF CUSTOMER SERVICE

1. Think of a situation where you experienced poor customer service:

What happened? _____

How was it handled? _____

How did you feel about it? _____

What was the result? _____

Would you deal with that party again? Yes No

2. Think of a situation where you experienced good customer service:

What happened? _____

How was it handled? _____

How did you feel about it? _____

What was the result? _____

Would you deal with that party again? Yes No

CUSTOMER-FOCUSED ORGANIZATION CASE STUDY

Metrobank is one of the largest banks in the New York City marketplace. With high volumes of customers per branch particularly during lunch time, Metrobank was concerned if they were delivering a level of service that was satisfactory to their customers.

In order to get an understanding of how their customers felt about the service being provided by Metrobank branches, they surveyed a statistically significant portion of their customer base, concentrating on customers that had visited a branch within the last 30 days (of the survey date).

While they found some positives, they also uncovered some complaints. The most predominant ones were:

Customers were not happy with the line waits at the branches, particularly at the teller windows. They indicated that the average line wait was about 15 minutes and indicated that a line wait of about 9 minutes would be acceptable.

Customers felt that the tellers were often busy doing work other than helping customers and that they should prioritize their time better, particularly when they see a long line wait during lunch hours. They based their responses on the fact that (1) they would often see the tellers at teller stations either doing work other than helping customers (i.e., talking on the phone) or taking care of personal business (i.e., eating lunch) and (2) there were often unmanned teller stations.

In order to study the situation further, Metrobank implemented a shopping program to determine what the tellers were doing and did time and motion studies to determine the teller line wait problem.

What they found was:

Tellers were very productive in their jobs; they spent almost no time taking care of personal business. In fact, they often ate lunch at their work stations so they could help serve customers during their lunch hour.

Phone calls made from the teller work stations were almost always work related. Sometimes it was a branch customer service rep and not a teller that was working with a customer on a problem at a teller station to solve a customer issue and perform a transaction so that customers would not have to wait in a second line.

On average, teller line waits were about 8 minutes, not 15 minutes as indicated by the customers. In fact, only about 5% of all teller line waits were at or in excess of 15 minutes.

However, while the actual news was good, there was still a lot of customer dissatisfaction that, through previous studies, represented a great risk to Metrobank in terms of losing customers.

If you were Metrobank management, what would you do to solve this problem? Given the above facts, what are some solutions you would recommend?

CUSTOMER-FOCUSED ORGANIZATION CASE STUDY ANSWER KEY

The main three solutions implemented by Metrobank were:

Metrobank invested in automated line wait equipment for every branch with even a hint of a traffic problem. The line wait equipment: (1) accurately calculated customer line waits at teller stations so the bank had a warning system in place in case line wait got out of hand (2) indicated the time of day and an approximate line wait to everyone as they entered the roped off teller line wait section, thus ensuring that individuals were more accurately attuned to actual teller line waits and (3) had a clock that the customers looked straight at as they were in position to be called as the next customer to a teller station.

Metrobank put up curtains in all teller work stations. Now, when a customer service representative or teller was working on the phone or if a teller was eating lunch at his/her station so he/she could help out during his/her off-time, they could close the curtains so that the customers could not see what he/she was doing. In addition, large branches having more work stations than would ever be used could close the curtains at those stations so the branch did not look as if it had a lot of tellers missing all the time.

In addition, Metrobank included a note on all customers' bank statements telling them that they listened to their complaints and have made changes in their branches to help reduce teller line wait.

Follow-up customer research indicated that the measures implemented by Metrobank helped solve customer dissatisfaction with teller line waits.

CUSTOMER PROFITABILITY CASE STUDY

ABC Plastics is a fast growing plastics manufacturing firm in Indiana. They have just secured a new client, Big Jim's Plumbing Supplies, the largest retail supplier of pipes in the entire United States. Big Jim's Plumbing Supplies decided to do business with ABC Plastics after a number of bad experiences with their old supplier, Piper's Pipes. They often found that products shipped by Piper's Pipes were incorrectly labeled, that pipe was often not cut correctly, that some product was of poor quality and that orders received did not match orders requested.

Since Big Jim's Plumbing Supplies was such a large new client, ABC Plastics hired new staff across a wide range of job functions and put each employee through an extensive two-week training program.

Today is the first day for four of these new employees. As luck would have it, ABC Plastics just received their first big rush order from Big Jim's Plumbing Supplies and the new employees will play an important role in the manufacturing and packaging of the order that will be shipped to Big Jim's.

Since this is day one, before the employees are allowed on site they are inspected by Mr. Composite, ABC Plastics' Safety Compliance Officer. If the employees are not properly equipped from a safety perspective it won't matter how well they perform their job functions, and the plant risks serious consequences that could lead to major delays in filling all customers' orders. Mr. Composite makes note that all the new employees are safely equipped with applicable gloves, masks, goggles, steel-toe shoes, hearing protection, etc.

The specific order from Big Jim's was for 75 different pipe products in sizes and materials that could be quite similar in nature (i.e. slight differences in the size of the pipe). The products needed to be very precise to satisfy Big Jim's customers.

The four new employees are:

Ms. Fiberglass, whose job is the packaging of PVC pipe.

Mr. Sand, whose job is to inspect the pipe for quality and to ensure proper labeling of product.

Ms. Ceramic, whose job is to make the proper machine adjustments as different pipes are being made.

Mr. Lead, whose job it is to move the pipe to its proper holding bin for packaging.

Without informing the new employees, management at ABC Plumbing decides to do two dry runs to ensure that the new staff is up to their new tasks.

1. At the end of the first dry run, management noticed that some of the pipe was incorrectly labeled. They called aside Mr. Sand for a review and held him accountable, saying he should have caught the error during his inspection. Mr. Sand insisted he did his job correctly. Is it possible that he was correct? If so, how could the problem have happened?
2. At the end of the second dry run, management noticed that the items contained in the order were incorrect. They called aside Mr. Lead for a review and held him accountable, saying he brought the pipe to the wrong storage area. Mr. Lead insisted he did his job correctly. Is it possible that he was correct? If so, how could the problem have happened?
3. What do the first two questions indicate about the dependency workers have on their fellow employees as it relates to their job performance?
4. List all the dependencies these four new employees have on one another.
5. If the dry runs were in fact the real thing and these orders were shipped to Big Jim's Plumbing Supplies, considering their experience with Piper's Pipes, do you think they would have kept doing business with ABC Plastics?
6. If Big Jim's took their business elsewhere, what do you think would happen to ABC Plastics' profitability? Would there be any impact on jobs? If yes, what would that impact be?

CUSTOMER PROFITABILITY CASE STUDY

ANSWER KEY

1. At the end of the first dry run, management notices that some of the pipe was incorrectly labeled. They called aside Mr. Sand for a review and held him accountable, saying he should have caught the error during his inspection. Mr. Sand insists he did his job correctly. Is it possible that he was correct? If so, how could the problem have happened?

ANSWER: It is possible that Mr. Sand did his job correctly. Ms. Ceramic could have made incorrect machine adjustments so the correct label was placed on a product incorrectly manufactured. If labeling was done after the product is moved to the correct bin for packaging, Mr. Lead could have placed the product in the wrong bin.

2. At the end of the second dry run, management notices that the items contained in the order were incorrect. They called aside Mr. Lead for a review and held him accountable, saying he brought the pipe to the wrong storage area. Mr. Lead insists he did his job correctly. Is it possible that he was correct? If so, how could the problem have happened?

ANSWER: It is possible that Mr. Lead did his job correctly. Once again, the problem could have been that Ms. Ceramic made incorrect machine adjustments. It is also possible that Mr. Sand incorrectly labeled product and that Ms. Fiberglass packaged the product incorrectly.

3. What do the first two questions indicate about the dependency workers have on their fellow employees as it relates to their job performance?

ANSWER: Co-workers are very dependent upon each other. In fact, how well your co-workers perform not only has an impact on the amount and type of work you have to do, but can also impact how you are perceived in your job and your job compensation. If Ms. Fiberglass' job performance was partly based on how much pipe she packed in a day, a large amount of incorrect machine adjustments could lead to a lot of double packing of orders resulting in a low number of items packed.

4. List all the dependencies these four new employees have on one another.

ANSWER: Ms. Fiberglass relies on correct machine adjustments by Ms. Ceramic, correct product labeling by Mr. Sand and, if the pipe is packaged after it is moved, that placement in the correct bin by Mr. Lead. Mr. Sand relies on correct machine adjustments by Ms. Ceramic and if labeling is done after the pipe is moved, movement to the correct bin by Mr. Lead. Ms. Ceramic does not rely on any of these employees but is dependent on the individuals that take the customer orders (so the machine is set to the correct customer specifications) and on the individuals responsible for machine maintenance. Mr. Lead relies on correct machine adjustments by Ms. Ceramic, correct product labeling by Mr. Sand, and if the pipe is packaged prior to being moved to the correct bin, correct packaging of product by Ms. Fiberglass.

CUSTOMER PROFITABILITY CASE STUDY ANSWER KEY

5. If the dry runs were in fact the real thing and these orders were shipped to Big Jim's Plumbing Supplies, considering their experience with Piper's Pipes, do you think they would have kept doing business with ABC Plastics?

ANSWER: No, these are the same problems they were experiencing with their old supplier, whom they left.

6. If Big Jim's took their business elsewhere, what do you think would happen to ABC Plastics' profitability? Would there be any impact on jobs? If yes, what would that impact be?

ANSWER: ABC Plastics' profitability would be worse than if they had never taken this account. ABC Plastics would have all the costs associated with the new client (more employees, more machines, more raw materials, etc.) with none of the revenues. Jobs would surely be lost if the account could not be replaced quickly.

CUSTOMER SERVICE TEACHING PLAN OVERVIEW LESSON 2

This lesson plan is for three hours. Take two 10-minute breaks at appropriate times.

TOPIC	TIME	COPIES REQUIRED as HANDOUTS
Identifying Customers- <i>Competency</i>	60 minutes	Who Are Your Customers? Role Play Exercise - page CS21
Customer Service Delivery and Measurements	90 - 100 minutes	Customer Service Quality Measurements Handout - page CS24 Custom Rental, Inc./Southside Equipment, Inc., Case Study - pages CS25-29 Southside Equipment, Inc.- What Happened -page CS31 Customer Service Measurement Exercise - page CS32

CUSTOMER SERVICE TEACHING PLAN LESSON 2

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Identifying Customers- <u>Competency</u>	Who Are Your Customers Role Play Exercise - page CS21	Page CS22-23	Start with the Who Are Your Customers Role Play Exercise . Break the class into groups of three. Have each member of the group select a different scenario where he/she plays the employee and the other two members of the group play a different type of customer (i.e. one external to the company, one internal). Have the customer ask the employee an appropriate question regarding the service that employee performs for that particular customer. Using the board or a flipchart, ask the class to list all of the appropriate customers for each position. Stress how there are both internal and external customers for every job.

INSTRUCTOR NOTES:

Perform the in-class exercises and provide opportunities for participants to meet their requirement for answering a minimum of 6 questions correctly during classroom discussions. Use the answer keys for the case studies and exercises to be sure you present the pertinent answers. For the **Who Are Your Customers Role Play Exercise**, if you do not have a number evenly divided by three you can either participate yourself or adjust the sizes of one or more groups and modify the exercise slightly.

This is a competency that they must perform correctly.

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Customer Service Delivery and Measurements	Customer Service Quality Measurements Handout - page CS24 Custom Rental, Inc./Southside Equipment, Inc., Case Study - pages CS25-29 Southside Equipment, Inc.- What Happened - page CS31 Customer Service Measurements Exercise - page CS32	Page CS30 Pages CS33-34	Start by stating that customer service is a business-wide or company-wide issue. On average, only 23% of all employees deal directly with external customers and 75%, on the average, contribute to the customers experience while never interacting directly with them. Have the class give examples of employees that contribute to the customers' experiences while never interacting directly with the customer (i.e. individuals that make products, individuals who investigate customer problems, the billing department, the computer programmers and technicians, etc.). Then use the Customer Service Quality Measurements Handout to review ways to measure service. Next break the class up into groups of three or four and distribute the Custom Rental, Inc./Southside Equipment, Inc., Case Study . After the groups finish, ask each group to present their findings to the class. Distribute and have the students perform the Customer Service Measurements Role Play . Ask the groups to present their service measurements. Comment/add to their measurements using the Service Measurement Role Play Answer Key .

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CUSTOMER SERVICE TEACHING PLAN

LESSON 2

INSTRUCTOR NOTES:

Perform the in-class exercises and provide opportunities for participants to meet their requirement for answering a minimum of 6 questions correctly during classroom discussions. Use the answer keys for the case studies and exercises to be sure you present the pertinent answers. To set up the **Customer Service Quality Measurements Handout**, be sure to stress that in order for there to be quality customer service delivered to customers, quality customer service must be defined. Once quality service is defined you have to set up ways of measuring service so that you can determine the level of service being delivered (whether or not quality service is being delivered).

The Custom Rental, Inc./Southside Equipment, Inc., Case Study is used for two competencies. One is for ability to solve customer problems and the other is for teamwork.

Therefore, be sure to follow directions and split up the class into teams. Use the competency checklist to be sure you measure competencies accurately. Make sure everyone participates in the group's recommendations to the class. Be sure to allow each group to go first for at least one question. This will help with presenting solutions to customer problems. Use the answer key to review acceptable solutions and, **Southside Equipment, Inc-What Happened** to inform the class of what really happened in this case study.

Customer service measurements key points include:

Coming up with service measurements is just half of the answer. The next step is providing a level of performance that needs to be attained for that service measurement in order to assure that quality service is being delivered to all customers.

Talk about the tough decisions businesses have to make regarding to cost vs. service levels. For example, all customers would like to have their own service representative dedicated just to them so they can call to get problems resolved 24 hours a day. Of course if a business did this, everyone would love the service but the company would go broke! As another example, use telephone talk time. While some customer service representatives feel they should spend as much time as needed helping a customer, this is not always the best for the business when compared to the service being provided to other customers. For example, while you spend 20 minutes with one customer, five others may have had to wait three minutes to get their call answered. So you provided very high quality service to one customer but poor service to five. That is why companies give phone representatives talk time goals. These are the average talk time on phone calls that phone representatives should work toward. By maintaining these average talk times, you are providing quality service to a larger portion of your customer base than if you averaged talk times well above those goals. This does not mean that all calls have to be at or below the talk time goal, but it does mean that you have to manage your individual talk time to come in at or below the average (i.e. if you have a long call, try to balance it by working more quickly with some very basic calls).

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COMPETENCY

WHO ARE YOUR CUSTOMERS ROLE~PLAY

Read the following job functions. Split up into groups of three. One person should play the employee listed in the scenario. The other two should play different customers that have an issue with that employee (at least one should play a co-worker). Then switch scenarios and roles. Everyone should play an employee at least once. Use as many of these scenarios as you need.

Scenario 1

You are a phone representative for a newspaper. Individuals call you up to place classified ads.

Scenario 2

You work on an assembly line putting together two pieces of a 10-piece product.

Scenario 3

You work as a file clerk in an attorney's office.

Scenario 4

You are a sales representative in a bank helping customers open up various types of bank accounts.

Scenario 5

You are a telemarketer selling a brand new home alarm system.

Scenario 6

You are a junior web designer whose job it is to create feedback forms for visitors to the company's web site.

Scenario 7

You work in a travel agency mailing hard copies of itineraries to travelers who book their trips with your travel agency.

Scenario 8

You work in a video store, categorizing and placing new movies on the shelves. You also work the cash register when you are not working on the new movies.

WHO ARE YOUR CUSTOMERS ROLE-PLAY ANSWER KEY

Show how the service provided can affect the ability of the internal customers to do their job properly.

Scenario 1

You are a phone representative for a newspaper. Individuals call you up to place classified ads.

Customers include: people placing classified ads, accounting department, printing department, etc.

Scenario 2

You work on an assembly line putting together two pieces of a 10-piece product.

Customers include: people buying the product, other workers on the assembly line, marketing department, accounting department, etc.

Scenario 3

You work as a file clerk in an attorney's office.

Customers include: the attorney, the clients, other attorneys, employees of the court, judges, etc.

Scenario 4

You are a sales representative in a bank helping customers open up various types of bank accounts.

Customers include: bank customers, accounting department, sales department, branch, etc.

Scenario 5

You are a telemarketer selling a brand new home alarm system.

Customers include: individuals you are calling on the phone, the representative of the company that owns the alarm systems, the individuals installing the alarms, etc.

Scenario 6

You are a junior web designer whose job it is to create feedback forms for visitors to the company's web site.

Customers include: visitors to the web site, the senior programmer who is incorporating your code into the overall web site, and the marketing staff (or other people who handle the responses) generates the feedback from questions, etc.

Scenario 7

You work in a travel agency mailing hard copies of itineraries to travelers who book their trips with your travel agency.

Customers include: the clients (travelers), the travel agents, the airlines/hotels/cruise ships/etc.

Scenario 8

You work in a video store, categorizing and placing new movies on the shelves. You also work the cash register when you are not working on the new movies.

Customers include: the customers at the store, the video distributors that represent the owners of the videos, the store manager, etc.

TOPIC A: CUSTOMER SERVICE QUALITY MEASUREMENTS

AREA	MEASUREMENT
Customer Service Center	<ul style="list-style-type: none"> • Number of rings before a call is answered. • Percent of time all trunks are busy. • Percent of calls abandoned (caller hangs up before call is answered). • Call monitoring for proper greeting, proper procedure (one stop service, correct information given to customer, etc.). • Test calls to ensure proper information is being given out for specific scenarios. • Percent of time phone representatives are off-line. • Number of times a phone representative is late to work. • Employee productivity measurements.
Back Office	<ul style="list-style-type: none"> • Problem resolution time frame. • Correspondence sent out on time (i.e. customer statements, etc.). • Accuracy, clarity of customer correspondences. • Quality control checks on correspondences (correct correspondences sent to proper customers). • Accuracy of accounting records. • Delivery deadlines met. • Employee productivity measurements.
Retail Outlet or Service Center	<ul style="list-style-type: none"> • Average line waits by type of function. • “Shops”, also referred to as <u>audits</u>, to determine if the employees are either selling correctly and professionally or are providing customers with the proper information or problem resolution. • Employee productivity and sales measurements.
Manufacturing	<ul style="list-style-type: none"> • Proper safety procedures followed. • Product inspection (sample finished product to accept/reject batches of work). • Machine inspection (to ensure working correctly and to ensure proper maintenance was completed). • Quality review of packaging and customer orders. • Measure production output and time frames. • Employee productivity measurements.

COMPETENCY

Custom Rental, Inc./Southside Equipment, Inc., Case Study (4 PAGES FOLLOW)

Read the one page background and three letters/memos that follow (total 4 pages). Then in groups:

1. Prepare an outline plan of action on how to deal with the current problem.
2. List all the individuals in Southside Equipment, Inc. that you feel should be involved in solving the problem.
3. How should the plan of action be implemented?
4. How will you handle the client (Custom Rental, Inc.)?
5. What issues must be addressed to prevent this problem from happening again?
6. What are your recommendations on customer service quality measurements?

Custom Rental, Inc./Southside Equipment, Inc., Case Study Background Information

Southside Equipment, Inc. is a well-established manufacturer of DIY and construction machinery, and sells its products to both large and small construction companies, to retailers of landscaping materials, and to equipment hire companies.

Custom Rental, Inc. hires out various types of DIY equipment in a very competitive market. The company must be very price-conscious, but must also offer reliable machinery to minimize breakdowns while the equipment is on rental hire to users. Salary levels for service staff are not high, so in-house mechanics are generally not the most qualified mechanics. On the other hand, service managers are critical to the operation, and are generally highly experienced and very influential when it comes to making equipment-purchase decisions

Custom Rental, Inc. was an important customer to Southside Equipment, Inc. However, a problem began to emerge with Southside Equipment, Inc. machines. A number were breaking down as a result of damage while loading or unloading the machines from transportation, not during actual usage.

What had not been taken into account was that rental/hire firms would hire this equipment out for all applications (including heavy-duty usage) in an effort to increase their profit by increasing the number of times the equipment was leased. Rental equipment tends to be used hard by many different operators with varying levels of skill. Engineering researched ways to fix the problem. As each proposed fix was presented to Custom Rental, Inc., customers perceived this as “more of a Band-aid than a solution” and the problem, from the customer’s point of view, remained.

Custom Rental, Inc.’s confidence in Southside Equipment, Inc.’s ability to solve the problem properly and promptly began to dwindle. Southside Equipment, Inc.’s service organization “caught a lot of the customer’s heat” even though they weren’t the ones responsible for developing the fix. Occasionally the service staff did try and explain that they were only following instructions from the engineering department, but it didn’t seem to help much.

SOUTHSIDE EQUIPMENT, Inc.

January 12, 2007

James Duggan
Managing Director
Custom Rental, Inc.
110 Orton Avenue
Dallas, TX 55545

Dear James:

We are pleased to send you our quotation for the National Accounts program. Please see the notes that follow the discount structure for additional terms and conditions of sales. All other standard terms of sale as outlined on our order acknowledgement will apply.

Please refer to our literature and price lists for a complete listing of available options, as well as standard equipment specifications and pricing.

We appreciate your interest in our products and look forward to a long, mutually profitable relationship. If anything has not been covered in the above terms, please let me know so that an addendum can be added immediately.

If everything is in order, please sign below so that we may circulate the pricing and discount structure to appropriate personnel who will be administering your account.

Sincerely yours,

R. Wilson

R. Wilson
Sales Director

CS27

Revision 8.1

Work Certified™ 1.2016



October 24, 2009

Mr. R. Wilson
Sales Director
Southside Equipment, Inc.
Johnson Industrial Park
Atlanta, TX 30001

Dear Mr. Wilson:

On August 7, 2009 we received from you a MaxWise Driller 3101 which, to date, has managed to make only one day's rental without breaking down. This machine has given us problems from the very beginning. When it was delivered, it had to be dragged off the trailer (at your representative's instructions) because of a mechanical jam.

We have dealt with a number of Southside Equipment, Inc. representatives at different levels of seniority in an attempt to resolve the loading/unloading problem with the MaxWise Driller 3101. They have all attempted to be helpful, though I am disappointed that it took 30 days to get one of your people to our yard. After telephone calls did not solve the problem, someone should have been on a plane to us. We made that suggestion more than once, but no such action was taken until this whole matter was taken to a senior level.

Given that the MaxWise Driller 3101 is still broken and no one seems to know what to do to repair it, I am convinced that we have received a lemon.

Although, I know warranty will cover the costs, we have suffered significant lost revenue, and a damaged image in the eyes of our customers who have tried to rent this machine.

Please send us a replacement MaxWise Driller 3101 and pick this one up so I can start to realize a return of my investment, which would also allow me to regain my previous belief that Southside Equipment, Inc. carries the best machine for the rental market.

I hope we can soon put this problem behind us. I look forward to hearing from you.

Sincerely,

Maurice Dunn

Maurice Dunn
Regional Manager

CS28

Revision 8.1

Work Certified™ 1.2016

Southside Equipment, Inc.

Internal Memorandum

To: Parts and Service Manager
From: Ralph Wilson, Sales Director
Date: March 26, 2007
Subject: Custom Rental, Inc. Concerns

This important customer has had consistent problems and failures with our machine and seems to be getting little or no service from us.

We seem to have nothing going but a “politeness and smile” campaign instead of real service and engineering solutions to problems.

Our regional manager says the rep that deals with Custom Rental, Inc., Ivana Strong, is tearing her hair out and can't get your departments to come together and come up with a solution.

On Monday morning the three of us will have a meeting and I wish to see your joint plan to solve this problem. We shall then let the customer know what is happening.

We shall also be examining how we go about dealing with customer service and customer complaints. Please have ready a copy of your existing standards of customer service and response, and be ready to propose what procedures and measures we should adopt to improve the situation.

This is to be considered urgent and a matter of survival for Southside Equipment Rental, Inc. if we are to retain any sort of reputation and competitive position in the equipment rental market.

CS29

Revision 8.1

Work Certified™ 1.2016

SOUTHSIDE RENTAL, INC. and CUSTOMHIRE, INC. CASE STUDY ANSWER KEY

Some potential solutions to the problem include:

A visit from a senior Southside manager including the engineer or service manager.

Immediate replacement of the machine with one that has been completely checked for quality.

Financial compensation (discount, rebate, better terms, etc.).

Free servicing for a specified time.

A letter from the managing director apologizing and detailing the steps Southside is taking.

Thanks to Custom Rental for keeping the faith and not moving their business.

Review of the procedures that led to this situation.

Market research to more effectively discover what different customer types actually require.

Development of a better “feedback” system to monitor customers’ views and reactions to the company’s product/service/actions.

Development of standards for product development including product quality controls.

Improvement in the problem-solving techniques in both the engineering department and the customer service department through improved training and better motivated employees.

Implementation of a quality control process.

Improved customer relations by attempting to stay “close to” customers rather than assuming that the relationship will automatically continue.

Improved record-keeping on products and customers.

Better communication between departments.

Better problem resolution and problem resolution reporting processes.

Hiring of individual account managers for large clients to create a “champion” for the customer’s point of view. The role of a service “champion” is to look at internal processes from the client’s perspective, instead of from the company’s perspective.

Establish a goal of zero-defect output.

SOUTHSIDE EQUIPMENT, INC.

WHAT HAPPENED

- The good news was that Southside was able to develop a true solution to the problem fairly quickly.
- They also worked to maintain a close customer relationship and placed greater emphasis on improving parts and service support.
- Greater support was received from the head office, and customers perceived better after-sales services in a number of areas – parts, service and warranty. In general, there was a perception of an improved attitude on the part of Southside, from management through to the people answering the telephone. The managing director and the sales director both visited Custom Hire's managing director to reinforce the message that Custom Rental was important. At trade shows, Southside representatives deliberately targeted Custom Rental representatives to discuss their needs and show how effective Southside was at meeting them.
- The result was a customer perception that while they may have taken too much time to solve the problem, they were a solid company whose employees cared about Custom Rental. Custom Rental had confidence that Southside would not run away from its problems.
- Another effect of the Southside crisis was that it made Southside evaluate its quality of after-sales support at a time when customers themselves were trying to get longer life out of their equipment, and the support operation began to improve its customer service.

CUSTOMER SERVICE MEASUREMENTS EXERCISE

Break the class up into four groups. Assign each group one of the jobs on the **Who Are Your Customers Role-Play Exercise** and one of the jobs in the **Customer Profitability Case Study**. Ask each group to come up with as many applicable customer service measurements as they can for their two assigned jobs.

Phone Representative for a Newspaper

Assembly Line

File Clerk

Bank Sales Representative

Telemarketer

Junior Web Designer

Travel Agency

Pipe Packaging

Inspecting Pipe

Moving Pipe

Adjusting Machines

CUSTOMER SERVICE MEASUREMENTS EXERCISE ANSWER KEY

Phone Representative for a Newspaper

Department as a whole: Percentage of calls answered within 20 or 30 seconds, percentage of all trunks busy, percentage of calls abandoned (not answered), etc.

Individual measurements: average talk time, numbers of calls handled per day, accuracy of data entry, phone monitoring to ensure quality service, test calls to assure accuracy of information presented to customer, time on phone, etc.

Assembly Line

Department as a whole: products completed per hour, quality measurements such as accept/reject batch of work through sampling, etc.

Individual measurements: productivity, individual quality performance, etc.

File Clerk

Department as a whole: accuracy of filing system, number of cases, etc.

Individual measurements: audit each individual's performance for accuracy of filing, productivity measurements, etc.

Bank Sales Representative

Department as a whole: number of sales, average sale amount, percent sale by type of product, sales per representative, line wait to see rep, etc.

Individual measurements: shop (a service audit where you send out individuals to interact with your employees and report on their experiences) to determine who is professionally and accurately interacting with customers, sales volume, sales dollars, average session time with customer, etc.

Telemarketer

Department as a whole: number of sales, percent closed, call volume, closed by category (town, development, etc.), etc.

Individual measurements: number of sales, percent closed, calls per hour, talk time, time logged into etc.

Junior Web Designer

Department as a whole: programming errors, specific feedback form use, hits on each form's web page, average time spent at site by form users, repeat visitors amongst form users, compare form users to non-form users at site, etc.

Individual measurements: programming errors, time spent per form, average program load time (code efficiency), feedback form from form content designer (did coded form match designers instructions), etc.

Travel Agency

Department as a whole: returned mail (incorrect address), customer satisfaction survey (process and vacation destination), correct itinerary for each customer, correct rates used in letter, etc.

Individual measurements: all above (except satisfaction survey) can be used as individual measurements also, itineraries mailed per hour, etc.

Pipe Packaging

Department as a whole: adherence to safety regulations, customer orders packaged correctly, etc.

Individual measurements: productivity measurements, items packaged correctly, packages marked correctly

Inspecting Pipe

Department as a whole: sampling of all products manufactured (accept/reject batch), review product specifications, product testing, etc.

Individual measurements: quality review (audit) of pipe inspected, productivity measurements, paperwork filled out correctly (quality inspection reports), etc.

Moving Pipe

Department as a whole: adherence to safety regulations, pipe moved to proper customer storage areas, pipe moved to proper product storage area, raw materials in proper location, etc.

Individual measurements: productivity measurements, individual quality review to ensure that each individual is moving pipe and raw materials to their proper location, etc.

Adjusting Machines

Department as a whole: adherence to safety regulations, review actual machine maintenance with maintenance schedules, sampling of all products manufactured (accept/reject batch), product labeling matches machine adjustment, etc.

Individual measurements: individual accountability for proper machine adjustments, proper training completed, paperwork completed properly, etc.

CUSTOMER SERVICE TEACHING PLAN OVERVIEW LESSON 3

This lesson plan is for three hours. Take two 10-minute breaks at appropriate times.

TOPIC	TIME	COPIES REQUIRED as HANDOUTS
Customer Perceptions	20 - 30 minutes	Customer Perceptions Case Study Questions - page CS39
Active Listening- <i>Competencies</i>	110 - 120 minutes	Active Listening Handout - pages CS41-42 Listening Skills Handout - page CS43 Active Listening Exercise: Attention - page CS44 Active Listening Exercise: Repeating - page CS45 Active Listening Exercise: Summarizing - page CS46 Exercise: Active Listening - page CS47
Barriers to Communications	20 -30 minutes	Barriers to Communications Exercise - page CS48

**CUSTOMER SERVICE TEACHING PLAN
LESSON 3**

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Customer Perceptions	Customer Perceptions Case Study Questions- page C39	Page – CS40	Distribute the Customer Perceptions Case Study Questions and have the participants complete the questions. Then discuss their answers. Talk about methods to obtain customer feedback - surveys, focus groups, shops. Talk about how customer perceptions are often as important as actual service delivery.

INSTRUCTOR NOTES:

Perform the in-class exercise and provide opportunities for participants to meet their requirement for answering a minimum of 6 questions correctly during classroom discussions.

Use the answer key for the case study to be sure you present the pertinent answers.

Methods:

Surveys – are the most accurate and need to be from a random sample of the population you are interested in obtaining feedback.

Focus groups – a small group from the population you are interested in are asked non-leading questions by a skilled facilitator. Not statistically significant, but you get detailed findings.

Shops - audits; not statistically significant because usually small size and not fully random but give an excellent feel for what is actually happening in the population in which you are interested.

You will need the Customer-Focused Case Study (Metrobank) to perform the customer perceptions exercise.

CUSTOMER SERVICE TEACHING PLAN - LESSON 3

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Active Listening- <u>Competencies</u>	Active Listening - pages CS41-42 Listening Skills - page CS43 Active Listening Exercise: Attention - page CS44 Active Listening Exercise: Repeating - page CS45 Active Listening Exercise: Summarizing - page CS46 Exercise: Active Listening - page CS47	N/A	Use the Active Listening Handout to go over the difference between hearing and active listening and to go over the building blocks of active listening (attention, cue, reflection). Then review the entire handout. Next distribute the Listening Skills Handout and review the building blocks and the stumbling blocks. Then do the four exercises in this order (change partners for every exercise): Attention Repeating, Active Listening. For large class sizes where you are doing these exercises in split groups, you can reduce each round by one-third (i.e. 3 minutes becomes 2 minutes). In these cases you will need more time in the Customer Service course.

INSTRUCTOR NOTES:

1. Active listening exercises are competencies.

Stress the difference between hearing and active listening. State this fact: with active listening you are listening 80% of the time and talking 20% of the time; with just hearing you are talking 50% of the time and listening 50% of the time. Make sure the participants switch partners during the exercises so that they can reuse stories. It is important that stories are not repeated so that there is no prior knowledge about what is being said during each new exercise.

2. A good method to use is to assign one person in each group as A, the other as B. Then have the A's rotate while the B's stay where they are. If you have an odd number, make one group a group of three and let them all rotate roles with one person sitting out each rotation.

CUSTOMER SERVICE TEACHING PLAN - LESSON 3

Keep in mind that everyone plays every role in all four of these exercises.

The instructor will need to rotate and observe to verify each participant's competency with these skills. For a small class, have all the exercises done in front of the class for easier verification.

This is a competency that they must perform correctly.

These four exercises comprise one competency.

Note - for large class sizes you may need to do these exercises in split groups. The instructor needs to observe all in-progress exercises to grade competencies.

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Barriers to Communication	Barriers to Communication Exercise - page CS48	Pages CS49-50	Perform the Barriers to Communications Exercise by dividing the class into three teams and recording the answers by team. Then distribute the Barriers to Communication Answer Key and go over the results and see which team got the most hits based on the information on the handout.

INSTRUCTOR NOTES:

Perform the in-class exercise and provide opportunities for participants to meet their requirement for answering a minimum of 6 questions correctly during classroom discussions.

Use the **Barriers to Communication** Handout for the case study to review the answers to the exercise. Go over all the information in this handout.

CUSTOMER PERCEPTIONS CASE STUDY QUESTIONS

Review the customer-focused organization case study “Metrobank” (see page 12).

1. Indicate if the problems experienced by the customers were real or perceived.
2. Do companies have to deal with perceived problems as well as real problems? Explain your answer.
3. List some businesses (retail- or service-oriented) where you feel poor service is the rule not the exception.
4. Now think about the last two times you used that service. Was it good or bad? Is the service really as bad as you think it is?
5. Now think of some products you use where the brand name is important. Are you willing to pay more for that product? Why?
6. Now think of some products where you could care less about the brand you use, instead you use the best priced product? Why?

CUSTOMER PERCEPTIONS CASE STUDY QUESTIONS ANSWER KEY

1. Indicate if the problems experienced by the customers were real or perceived.

ANSWER: The problems were perceived problems. The teller line wait was not as long as they perceived and the tellers were not slacking off, they were helping out.

2. Do companies have to deal with perceived problems as well as real problems? Explain your answer.

ANSWER: Yes, customers leave for perceived issues as often as they leave for real issues.

3. List some businesses (retail- or service-oriented) where you feel poor service is the rule not the exception.

ANSWER: Some common answers could be the post office, driver's license office, cable TV service, etc.

4. Now think about the last two times you used that service. Was it good or bad? Is the service really as bad as you think it is?

ANSWER: Use some of your own experiences.

5. Now think of some products you use where the brand name is important. Are you willing to pay more for that product? Why?

ANSWER: Use some of your own experiences.

6. Now think of some products where you could care less about the brand you use, instead you use the best priced product? Why?

ANSWER: Use some of your own experiences.

TOPIC B: Active Listening



What is it? 20% Speaking 80% Listening

- Listening in a way which enables you to be concerned with others' views and feelings, not just your own
- It involves all the communication channels
- It involves concentrating and responding appropriately, which is letting the other person know that you have heard them
- It is the most useful communication skill you can develop.

Why do you need to listen actively?

- To help you understand what others are saying
- To stop your own attitudes and prejudices from getting in the way
- To find out the real concerns of other people
- Because words are an *imprecise* form of communication
- To aid in decoding some messages
- To understand emotions and feelings
- To build bridges and develop relationships
- To decide what action is appropriate.

How to do it:

- Normal conversation – 50% speaking: 50% listening
- Active listening – 20% speaking: 80% listening

Hearing – (Normal Conversation: 50% speaking ~ 50% listening)

- Passive
- Easily forgotten
- Doesn't really register
- You show you aren't really concentrating
- No notes made or over-full notes

Active Listening – (20% speaking – 80% listening)

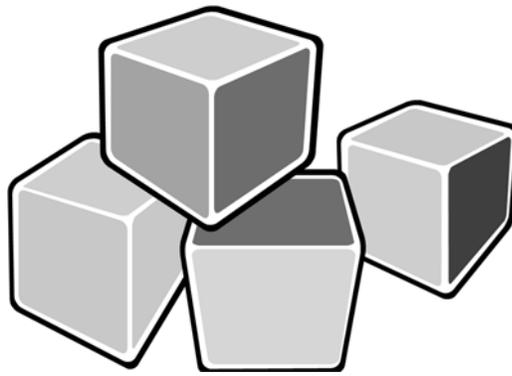
- Eye contact
- Keep concentrating
- Summarizing
- Behavior shows you are concentrating
- May make a few notes

Benefits of Active Listening

- You really do register the message
- The other person sees you are trying to understand
- You are more likely to create a good atmosphere

Examples of Building Blocks

- **Attention:** leaning forward, open body posture (not arms and legs crossed, etc.), eye contact, nodding, positive facial expression (including smiling)
- **Cues:** hmmm; and then..., open ended questions- what/why/when/how/where/who (but not too many), tell me about your situation/problem
- **Reflection:** repeating brief (key) phrases, paraphrasing using your own words to repeat the content, summarizing



LISTENING SKILLS

Building Blocks and Stumbling Blocks

Active listening building blocks:

Attention	<ul style="list-style-type: none"> • Posture • Body motion • Eye contact • Environment (removal of distractions) • Attentive silence • Showing concern and interest
Cues	<ul style="list-style-type: none"> • Invitations to talk • Infrequent and open-ended questions
Reflection	<ul style="list-style-type: none"> • Paraphrasing by using key words • Reflecting by linking the feelings expressed to the content • Summarizing the key points • Understanding customers' problems

Active listening stumbling blocks:

Judging	<ul style="list-style-type: none"> • Criticizing • Name calling • Prejudices
Sending solutions	<ul style="list-style-type: none"> • Ordering • Moralizing • Threatening • Know-it-all • Advising
Avoiding others' concerns	<ul style="list-style-type: none"> • Diverting • Reassuring (Commiserating) • Selective listening

COMPETENCY

ACTIVE LISTENING EXERCISE: ATTENTION

Select a topic you can talk about easily (i.e. your favorite music group or movie, your favorite vacation spot, etc.).

You will be placed in groups of twos. Sit directly facing each other.

Take turns talking about your topics. The **speaker** should talk about their topic for about three minutes. The **listener** should use “attention skills” to show concentration, interest and appropriate reactions to what is said. The listener should not talk at all during the exercise.

After the speaker is finished, let your partner know if you felt they were interested and paying attention to your story.

Each person should take turns being the speaker and the listener.

COMPETENCY

ACTIVE LISTENING EXERCISE: REPEATING

Select a topic you can talk about easily (i.e. your favorite music group or movie, your favorite vacation spot, etc.). If you are with a new partner you can use the same topic you used in the previous exercise.

You will be placed in groups of twos. Sit directly facing each other.

Take turns talking about your topics. The **speaker** should talk about his/her topic, but this time stop after every three sentences. The **listener** should then repeat what the speaker said word for word. The exercise should be done for a total of nine sentences. That means three rounds of talking and repeating.

Each person should take turns being the speaker and the listener.

COMPETENCY

ACTIVE LISTENING EXERCISE: SUMMARIZING

Select a topic you can talk about easily (i.e. your favorite music group or movie, your favorite vacation spot, etc.). If you are with a new partner you can use the same topic you used in the previous exercise.

You will be placed in groups of twos. Sit directly facing each other.

Take turns talking about your topics. The **speaker** should talk about his/her topic, but this time stop after every three paragraphs. The **listener** should then summarize what the speaker said, picking out the main ideas of the story. The exercise should be done for a total of nine paragraphs. That means three rounds of talking and summarizing. The listener should not ask questions during this exercise.

Each person should take turns being the speaker and the listener.

COMPETENCY EXERCISE: ACTIVE LISTENING

This exercise uses all of the previous skills (from both the lecture and exercises) together.

Select a real life problem you can talk about easily (i.e. a problem at a restaurant, a problem at work, a problem at school, trouble getting up in the morning, a problem with a friend, etc.).

You will be placed in groups of threes. Sit in a circle facing each other.

Take turns talking about your problems. The **speaker** should talk for about 10 minutes but this time the **listener** can provide feedback and ask questions whenever they feel it is appropriate. The **listener** should pay attention, listen for key words, allow the speaker to do most of the talking, try to use the speaker's words to reflect back what was said and use all previous tools to show the speaker that the problem is understood. The third person is an **observer**. The observer should be quiet throughout the entire exercise. However, when the exercise is over the observer will provide feedback regarding how well the listener showed interest and understanding to the speaker.

Each person takes turns be the speaker, the listener and the observer.

BARRIERS TO COMMUNICATION EXERCISE

List as many barriers to communication as you can for each of the following categories:

Language

Psychology

Business

Situation/Topic

Communicator's Weakness

Receiver's Weakness

BARRIERS TO COMMUNICATION ANSWER KEY

Language

Language is a barrier to effective communication. The vocabulary of both the individual communicating a problem and the individual listening to the problem can be problematic. Also, when discussing your solution to a customer's problem, be sure not to use jargon, especially not jargon internal to your company (i.e. "Go to the bank and speak to the CSR" should be "Go to the bank and speak to a customer service representative"). Finally, make sure that there is no ambiguity, rambling or double meanings in your communications with your customers.

Psychology

Individual personalities are also barriers to effective communication. Emotion (fear, shyness, aggression) and frame of reference (bias, prejudice, experiences, and assumptions) shape communications. In addition, the current mood and life pressures on both the individual with a problem and the individual who is listening to the problem impact communication.

Business

Communication is also impacted by the policies, systems and structure within the company for which you work. For example, customers that experience long telephone wait times (due to insufficient staff) will have a different attitude on the phone than customers who waited a very short time on the telephone before their calls were answered.

Situation/Topic

The environment in which you work and the surrounding circumstances may also be barriers to effective communication. For example, the time of day when a call is answered could be a factor in communications (i.e. during a hectic lunch hour). Also the temperature in the room, the noise volume in the room and the number of intrusions and interruptions can impact communication.

Communicator's Weakness

The customer who is informing you about his/her problem may have some communication shortcomings. They may:

- use an inappropriate tone or approach
- be unable to use communication skills adequately
- lack sufficient knowledge to communicate their problem effectively
- be a poor listener
- have a predetermined solution to the problem that is not a realistic solution

Receiver's Weakness

The customer service representative who is listening to a customer's problem may have some communication shortcomings. They may:

- be reluctant to receive information
- not be paying attention to the customer
- be unfamiliar with the content or subject matter
- be unprepared to handle customer calls

CUSTOMER SERVICE TEACHING PLAN OVERVIEW LESSON 4

This lesson plan is for three hours. Take two 10-minute breaks at appropriate times.

TOPIC	TIME	COPIES REQUIRED as HANDOUTS
Service Attitude	15 - 20 minutes	Service Attitude Test - page CS56
Personal Signals	30 - 40 minutes	Negative and Positive Personal Signals Handout - pages CS58-59
Telephone and Customer Service Techniques- <i>Competency</i>	75 -90 minutes	Telephone Technique Handout - page CS60 Statement/Question/Objection Exercise - page CS61 Managing Caller Behaviors Exercise - page CS63 Statements to Avoid Handout - page CS65 Statements to Avoid Exercise - page CS67
Customer Service Module Online Quiz	25 - 30 minutes	Online

**CUSTOMER SERVICE TEACHING PLAN
LESSON 4**

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Service Attitude	Service Attitude Test - page CS56	Page – CS57	Distribute the Service Attitude Test and have the students take it.

INSTRUCTOR NOTES:

Explain why all answers are false.

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Personal Signals	Negative and Positive Personal Signals Handout - pages CS58-59	N/A	Talk about personal signals. This is discussed in Business Communications as students may reference back to that information. We all send out personal signals all the time, mostly reflecting our attitudes and responses to the communication situation we are in. By watching for and responding to these signals appropriately we can build on the positives and reduce or eliminate the negatives on many occasions. Ask the group to give examples of boredom. Distribute and review the Negative and Positive Personal Signals Handouts.

INSTRUCTOR NOTES:

For those familiar with the book *Dune* by Frank Herbert, the observation of personal signals was a major theme in the book, allowing individuals who were political enemies to try to read the real meaning behind the words being spoken.

CUSTOMER SERVICE TEACHING PLAN
LESSON 4

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
<p>Telephone and Customer Service Techniques- <u>Competency</u></p>	<p>Telephone Technique Handout - page CS60</p> <p>Statement/ Question/ Objection Exercise - page CS61</p> <p>Managing Caller Behaviors Exercise - page CS63</p> <p>Statements to Avoid Handout - page CS65</p> <p>Statements to Avoid Exercise - page CS67</p>	<p>Page CS62</p> <p>Page CS64</p> <p>Page CS66</p> <p>Page CS68</p>	<p>Distribute the Telephone Technique Handout and review the material with the class. Next, set up the Statement/Question/Objection Competency by informing the class that when talking to customers there are only three types of expressions you hear: statements, objections or questions. If you fail to listen closely there are three things that can happen: you will hear what you want to hear, you will hear what you expect to hear, or you will not recognize the difference between a statement, question or objection (opinionated statement). The proper action and customer response depends upon how you classify what was said to you. Give some examples.</p> <p>Indicate to the class that if they ignore objections a caller will usually: (1) stop you and repeat the objection or question, or (2) not say anything to you but still be dissatisfied because you ignored them. Go over how to manage objections.</p> <p>Distribute the Statement/ Question/ Objection Competency, have the students perform the competency, collect it, grade it and go over the results. Next distribute, go over and have the students perform the Managing Caller Behaviors Exercise. Break the class into three or four groups. Ask them to discuss each type of call and try to determine some behaviors to use to handle these types of calls. Record each group's answers on a board. Then use your Managing Caller Behaviors Exercise Answer Key to fine tune the results. Distribute the Statements to Avoid Handout and ask the students to fill it out. Use the Statements to Avoid Handout Answers and review it with the class.</p> <p>Distribute the Statements to Avoid Competency and ask the students to perform the exercise. Review the correct answers using the Statements to Avoid Competency Answer Key.</p>

CUSTOMER SERVICE TEACHING PLAN

LESSON 4

INSTRUCTOR NOTES:

Talk about the need to take notes when performing customer service functions. After one day we forget 46% of what we heard, after 7 days we forget 65% of what we heard, after 14 days we forget 79% of what we heard.

Some examples for statements/ questions/objections with consequences follow:

EXAMPLE 1:

You say, "Your prices are a little higher than I thought they would be." Ask the class if this is an objection, statement or a question. Then ask how they would respond to that statement. One possible remark could be: "I hope that won't be a problem. They are excellent products. May I have your billing address?" This is a correct reply to that statement. If the employee interpreted the remark as an objection rather than as a statement, the conversation could have gone in an undesirable direction. For example, the employee says, "Our prices are very competitive; in fact, we lowered them this year."

The customer responds, "They still seem high to me."

Employee: "If you compared our prices to our competitors you would find that our prices on average are very competitive."

Customer: "Who are your major competitors?"

EXAMPLE 2:

Now show how a similar remark would be made as an objection.

You: "Your prices seem high and I think I should shop around and compare prices before I place my order." You cannot ignore objections; they will not go away. Here a response of, "I am sure you will be satisfied with our product. Will a Friday delivery date be okay?" will not be effective. You could lose that customer. Instead, offer a response such as, "That's fine. Our customers tell us we are very price competitive. We recently lowered our prices on the model you are considering and it continues to carry the best warranty in the industry. If you place your order now, we could deliver it early next week."

Managing objections:

1. Listen to what the caller says.
2. Always provide an immediate response.
3. State the response in clear and positive terms.
4. Do not provide unnecessary information and conversation.

During the Managing Caller Behaviors Exercise inform the class that many of the techniques stated can be used for working with internal customers and for in-person customer contact as well as for customers over the phone.

This is a competency that they must perform correctly.

Statement/ Question/ Objection is a competency. Collect and grade the results.

The Statements to Avoid is a competency. Collect and grade the results.

CUSTOMER SERVICE TEACHING PLAN ~ LESSON 4

TOPIC	TOOL	ANSWER KEY	LECTURE FLOW
Customer Service Quiz- <u>Competency</u>	LMS Database/Program Website- www.workcertified.org		See hardcopy of quiz and answer key in Chapter 3: LMS Database/Module Quizzes

INSTRUCTOR NOTES:

Distribute the Member Program Evaluation Form (see Chapter 2) just prior to handing out this quiz and be sure to fill out your Instructor Program Critique Form (see Chapter 2). Members must score 80% or higher on this online quiz to be eligible for certification.

This is a competency that they must perform correctly.

SERVICE ATTITUDE TEST

Answer the following questions, true or false.

1. True **False** Customers expect too much from customer service representatives; after all they are not management and are only doing their jobs as best they can.
2. True **False** If there are problems in the workplace, customers need to be more understanding when dealing with those employees.
3. True **False** Customers who expect a quick response to every question are not reasonable.
4. True **False** Customers need to be more thorough when they have a problem and not be so quick to call customer service.
5. True **False** Customers who complain about being placed on hold for a couple of minutes are unreasonable customers.
6. True **False** Customers need to be aware of how hard a customer service representative's job is so they will be more understanding when dealing with customer service representatives.
7. True **False** Customers need to chill out and not be so impatient about getting their problems resolved.
8. True **False** Customers need to be patient while the phone representative finds the right person to solve their problems, even if they have to be transferred to a couple of different people before they get to that person.
9. **True** False Customers who ask to speak to a customer service representative's supervisor without giving the customer service representative time to solve their problem should be discouraged from speaking to the supervisor until the phone representative has had time to deal with their issue.
10. True **False** Customers are too dependent on customer service representatives. They should take time and read all manuals and correspondences before calling.

SERVICE ATTITUDE TEST ANSWER KEY

Have the students grade their tests by giving themselves one point for every false answer and two points for every true answer. All the answers are false. Therefore, a perfect score is 10. Anyone scoring over a 13 on the test needs to work on his/her customer service attitude.

1. Customers do expect a lot of service. As a provider of customer service, it is not your job to define your customers' needs, but to respond to those needs.
2. Why should the customer need to understand your problems? They are concerned with their own problems.
3. The customer feels it is reasonable. Customers call when their work involves your company. They do not want to wait.
4. Some customers become very dependent on companies they do business with. This is exactly what the company wants. Customers who feel comfortable calling a company will become regular customers.
5. Try this: look at the second-hand on your watch, then close your eyes. Keep them closed until you think a minute has elapsed, and then open them. More than likely you opened your eyes before the minute was up (instruct the students not to count). A minute can be a long time.
6. The customer doesn't care how busy you are. Customers want to feel important. When they call they expect your full attention.
7. Yes, they probably should. Impatience, however, comes with the territory.
8. A customer wants fast, courteous service. When they have to wait, they are not getting what they want. When callbacks are unavoidable, arrange to call the customer at a specific time. Do everything possible to honor this commitment.
9. Some customers are too quick to talk to supervisors. When they ask to do so they are saying, "You are not meeting my needs and I want to talk with someone else." There will be times you cannot satisfy a customer. Discuss these situations with your supervisor to learn how they are to be handled. One way to handle these calls is to say, "I have no problem with you talking to my supervisor but I have been trained to handle customer problems. Let me try to correct the problem. If you are not satisfied after I work the issue, I will put you right through to my supervisor." Most customers will let you handle their problem since now they have two chances of getting the problem resolved to their liking.
10. Yes, some customers could avoid calling if they tried to solve their own problems. But why should they? The customer's view is, "That's your job." Why should they spend time solving problems when the company offers customer service? Be grateful when customers call. They keep people employed.

TOPIC C: Negative Personal Signals

Behavior	Reason	Circumstances	Response
Yawning/Cupping chin in hands	Boredom, Fatigue	<ul style="list-style-type: none"> • Long meetings • Inactivity/no participation • No stimulation 	<ul style="list-style-type: none"> • Invite people for particular topics only • Keep the meeting on course, to the point
Scowling	Annoyance, Disagreement, Confusion	<ul style="list-style-type: none"> • Exchange of opinions/ideas • Unwelcome instruction • Poor communication 	<ul style="list-style-type: none"> • Clarify the message • Acknowledge the disagreement but give your reasons and benefits of co-operation
Continued straight gaze, no head movement	Failing attention, Dislikes what is being communicated, Lack of cooperation	<ul style="list-style-type: none"> • Disciplinary/dispute occasions • Unwelcome instruction 	<ul style="list-style-type: none"> • Ask for reactions/ feelings • Ask for suggestions to improve the acceptability of what you say
One hand on back of neck	Disagreement, Annoyance	<ul style="list-style-type: none"> • Discussion of views, actions, etc. • Wants to state a different view 	<ul style="list-style-type: none"> • Allow expression of views • Show you appreciate their differences and give your reasons for your stance
Drumming fingers, tapping foot, etc.	Impatience, Boredom	<ul style="list-style-type: none"> • Long, drawn-out meeting • Topic irrelevant to them 	<ul style="list-style-type: none"> • Stay concise and to the point • Invite for specific topics only • Give a specific role
Looking over spectacles/narrowing eyes	Disapproval, Disbelief, Dislike	<ul style="list-style-type: none"> • Expects to challenge • Patience may be short 	<ul style="list-style-type: none"> • Allow expression of opinion • Show you acknowledge a different opinion • Give your reasons
Glasses removed and put down	No longer listening, Has made a decision	<ul style="list-style-type: none"> • Has heard all that is necessary • Does not want to hear more 	<ul style="list-style-type: none"> • Ask for the conclusion or decision • Acknowledge their reluctance to continue but say there are other points • Keep the remainder brief and relevant
Shifting position continually, avoiding eye contact	Not relaxed, Disagreement (different from just staring into space)	<ul style="list-style-type: none"> • Difficult situation • Wants to end the occasion • Wants to challenge 	<ul style="list-style-type: none"> • Encourage verbal participation • Ask open questions • Direct questions to the individual • Ask for a response or alternative • Keep the atmosphere positive
Stroking nose/rapid blinking	Exaggeration, Lying	<ul style="list-style-type: none"> • Defensive occasions • Negotiations 	<ul style="list-style-type: none"> • Ask for clarifying detail • Maintain a confident attitude • Challenge concisely but not threateningly

Behavior	Reason	Circumstances	Response
Leaning forward	Concentration, Increased emphasis	<ul style="list-style-type: none"> • Sales meetings • Negotiation • Communicating ideas 	<ul style="list-style-type: none"> • Make points clearly • State your own case • Maintain a win-win approach
Leaning back	Taking time to think, Inviting expansion, Looking for conclusions	<ul style="list-style-type: none"> • After a proposition/ exploration • Near end of meeting 	<ul style="list-style-type: none"> • Allow silence for thought • Ask if more information is needed • Wait for the other to speak first
Clasping both hands behind neck, steeping fingers	Extreme confidence, Relaxation	<ul style="list-style-type: none"> • Non-threatening situations • In charge of situation • Can be patronizing 	<ul style="list-style-type: none"> • Ensure the occasion doesn't dawdle • Maintain openness of situation • Be positive about your own case
Stroking chin or leaning chin on knuckles	Great interest, Great concentration	<ul style="list-style-type: none"> • Learning situation • Need to absorb information 	<ul style="list-style-type: none"> • Allow time for thought/absorption • Make points clearly
Tilting head	Interest, Listening	<ul style="list-style-type: none"> • Discussion • Instruction 	<ul style="list-style-type: none"> • Maintain positive attitude • Check understanding

TOPIC D: TELEPHONE TECHNIQUE

There are certain procedures that are fairly universal when answering a telephone call from a customer. They are:

1. Greet the caller by stating the name of your company, your name and “How may I help you”?
2. Use a friendly, cheerful tone when answering the phone.
3. Never place a caller on hold without first giving the caller a chance to respond (May I place you on hold please?) In other words, do not follow procedure number one and then say, “Hold please,” and place the caller on hold.
4. While working with a customer, ask them if you can place them on hold (i.e. “I need to look that information up on my computer. May I place you on hold for a moment?”).
5. Do not leave the customer on hold for a long time. Check back with the customer every minute to provide a status (i.e. “I am still working on your problem. I will have your answer shortly.”). (It is important to note what the company policy is when placing customers on hold – remember no one likes to be left on hold.)

COMPETENCY STATEMENT/ QUESTION/ OBJECTION

Circle the correct answer for each expression. Some expressions can have more than one correct response. In those cases, circle more than one answer.

Assume all expressions below were made in a normal voice. You will also notice that the punctuation has been purposely left out.

- | | | | | |
|-----|-----------|----------|-----------|--|
| 1. | Statement | Question | Objection | I think your service is the best in the business |
| 2. | Statement | Question | Objection | Your delivery dates are certainly long enough |
| 3. | Statement | Question | Objection | Why was I charged \$25 |
| 4. | Statement | Question | Objection | Your selection of pipes is insufficient |
| 5. | Statement | Question | Objection | You don't understand you delivered the wrong product |
| 6. | Statement | Question | Objection | When will you have quarter inch wrenches in stock |
| 7. | Statement | Question | Objection | What are you going to do to make it up to me |
| 8. | Statement | Question | Objection | I cannot wait any longer I need the product now |
| 9. | Statement | Question | Objection | Why are you always out of that product |
| 10. | Statement | Question | Objection | I refuse to pay that bill |

STATEMENT/ QUESTION/ OBJECTION COMPETENCY ANSWER KEY

1. Statement
2. Objection
3. Question
4. Objection
5. Statement, objection
6. Question
7. Question
8. Objection, statement
9. Question
10. Objection

NOTE: The difference between a statement and an objection often comes down to whether or not the customers indicate directly (or indirectly) that they are taking action because of their remarks.

MANAGING CALLER (CUSTOMER) BEHAVIORS EXERCISE

As an employee, you may be called upon to interact with customers. Not all customers are pleasant, easy-going, informed individuals. Read the scenarios below and indicate how you would approach dealing with that customer. What skills would you use in dealing with these customers' problems?

Scenario #1: A demanding, determined customer who is speaking in a very strong tone and wants immediate action.

Scenario #2: A customer who is very laid back. The customer has a serious issue but is not very effective communicating that problem.

Scenario #3: A customer who looks at you as not only an individual who can solve their problem but as a social outlet as well. This customer likes to talk and talk and talk.

Scenario #4: A customer who is furious. While the customer never crosses the line to inappropriate language, you feel they are constantly coming close to that line. Worst of all is that they have a very legitimate complaint.

MANAGING CALLER (CUSTOMER) BEHAVIOR EXERCISE ANSWER KEY

- Scenario #1:
- (1) Be sure to identify the problem correctly.
 - (2) No matter what, remain courteous and friendly.
 - (3) React only to the problem at hand and not the customer's tone.
 - (4) Remain focused and try to focus the customer by asking specific closed questions.
 - (5) Communicate your understanding of the importance of this issue to the customer.
- Scenario #2:
- (1) Draw the customer out by asking a lot of questions.
 - (2) Periodically, summarize what you know and ask the customer to comment on what you have determined or done so far.
 - (3) Make the customer feel comfortable by being warm and friendly.
- Scenario #3:
- (1) Ask only closed questions.
 - (2) Talk in long bursts and leave little time between statements (making it harder for the customer to interject personal comments).
 - (3) Remain friendly and courteous. Be careful not to be rude.
 - (4) Provide minimal response to off-topic questions.
- Scenario #4:
- (1) Apologize for the problem.
 - (2) No matter what, remain courteous and friendly.
 - (3) Be sure to identify the problem correctly.
 - (4) Be sure that you have resolved the customer's problem during your call and that you have communicated that solution effectively to the customer.
 - (5) Use your summarizing and repeating skills to communicate to the customer that you understand the nature and importance of the customer's problem.
 - (6) Once the problem is resolved, apologize again for the inconvenience that the problem caused the customer.

STATEMENTS TO AVOID

Which of the following statements have you heard (or used yourself) when dealing with a customer service representative?

1. Yes No Mr. Blue is still on break. May I help you?
2. Yes No Your problem should be resolved now.
3. Yes No Mr. Blue is busy working with management on a big customer issue. Can he call you back as soon as he is available?
4. Yes No I am sorry for the inconvenience this may have caused you.
5. Yes No Mr. Blue was feeling sick and left to see a doctor.
6. Yes No I am sorry that you haven't heard from the billing department yet, but they are backlogged.
7. Yes No Mr. Blue is not in yet. Can I help you?
8. Yes No Mr. Blue went home early. Can he call you tomorrow?

STATEMENTS TO AVOID ANSWER KEY

Which of the following statements have you heard (or used yourself) when dealing with a customer service representative?

1. Yes No Mr. Blue is still on break. May I help you?
 Correct: Mr. Blue is away from his desk, can I help you?
 (Note: “still” indicates he should have been back.)

2. Yes No Your problem should be resolved now.
 Your problem is resolved now.
 (Note: no one wants to feel their problem may be resolved, they want it resolved.)

3. Yes No Mr. Blue is busy working with management on a big customer issue, can he call you back as soon as he is available.
 Mr. Blue is unavailable, can I help you?
 (Note: saying Mr. Blue is working a big customer problem indicates that the company has issues and, besides, what is this customer, chopped liver? This customer’s problem is important too.)

4. Yes No I am sorry for the inconvenience this may have caused you.
 I am sorry for the inconvenience this has caused you.
 (Note: no weak words like “may”.)

5. Yes No Mr. Blue was feeling sick and left to see a doctor.
 Mr. Blue is unavailable, can I help you?
 (Note: do not give personal details unless it is a family member calling.)

6. Yes No I am sorry that you haven’t heard from the billing department yet, but they are backlogged.
 I am sorry for the inconvenience this has caused you; I will contact the billing department and make sure they contact you.
 (Note - never indicated a work problem like backlogged.)

7. Yes No Mr. Blue is not in yet. Can I help you?
 Mr. Blue is unavailable. Can I help you?
 (Note - yet means he should have been in already which, even if true, is none of the customer’s business.)

8. Yes No Mr. Blue went home early. Can he call you tomorrow?
 Mr. Blue is unavailable. Can I help you?
 (Note - went home early is too much personal detail for a customer.)

COMPETENCY STATEMENTS TO AVOID

Read the statements below. Rewrite any statement that you feel portrays a negative image of the company.

1. "You should receive your refund by the end of next week."

2. "Mr. Blue left early. Call back tomorrow morning."

3. "I'm sorry for the inconvenience this may have caused you."

4. "Mr. Blue has still not returned from his lunch meeting. Why don't you call back later."

5. "I know we have had a lot of problems with our billing department. Don't worry, I have just updated your records with the correct amount."

6. "Mr. Blue cannot come to the phone. He isn't feeling well. He is sweating bullets."

STATEMENTS TO AVOID COMPETENCY ANSWER KEY

1. “You should receive your refund by the end of next week.”
Your refund will arrive by the end of next week.
NOTE: Never use words like “should.” Be direct and positive.
2. “Mr. Blue left early. Call back tomorrow morning.”
Mr. Blue is unavailable. How may I help you?
NOTE: Customers should not be given any personal information such as Mr. Blue having left early.
3. “I’m sorry for the inconvenience this may have caused you.”
I’m sorry for the inconvenience this caused you.
NOTE: Do not use the word “may”.
4. “Mr. Blue has still not returned from his lunch meeting. Why don’t you call back later.”
Mr. Blue is in a meeting. I will have him call you as soon as he gets back.
NOTE: There is no need to identify the meeting as a lunch meeting and the word still indicates that you expected him back but he is running late. Do not use words such as “still”.
5. “I know we have had a lot of problems with our billing department. Don’t worry, I have just updated your records with the correct amount.”
I will correct your problem immediately and send the information to our billing department to update your account. You will see the correction on your next billing statement.
NOTE: Never tell a customer that you are having internal problems. You always want to present your company in a positive light to customers so they will continue to do business with the company, keeping everyone employed.
6. “Mr. Blue cannot come to the phone. He isn’t feeling well. He is sweating bullets.”
Mr. Blue is unavailable. If you tell me the nature of your problem I will direct you to someone else who can help you immediately.

NOTE: There is no need to provide customers with the health details of Mr. Blue.