

CUSTOMER SERVICE MODULE INSTRUCTOR'S 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

CS4

Revision 8.1

Work Certified™ 1.2016

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.

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 .

CS19

Revision 8.1

Work Certified™ 1.2016

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).

CS20

Revision 8.1

Work Certified™ 1.2016

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 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.