Developing Customer Service Skills

Facilitator’s Manual

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Introduction

Goal – Participants will become familiar with the Customer Service course goal and materials.

Objectives –
   A. Participants will navigate the Developing Customer Service Skills website.

Materials –
   o Computers with Internet connection
   o Building Customer Service Skills website
   o LCD Projector
   o Folders for student portfolios

Facilitator Notes-

Ask each participant to tell a little bit about themselves including, their name, if they have ever had a job that required customer service skills and what the job was, and what they hope to learn in the class.

The Facilitator should introduce him or herself and take notes on the types of jobs participants have had and what they say they would like to learn. To draw on participants’ previous experiences, incorporate this information into the lessons and activities whenever possible.

In this course, you won’t use a workbook. Instead, we will use a website.

Broadcast the website with the facilitator’s computer and assist participants in accessing the site from their computers. You can save it as a “Favorite” to facilitate future navigation. Lead the class through the navigation of the site by:
   • Demonstrating the side panel navigation
   • Demonstrating closing activities
   • Demonstrating opening course documents, entering information, saving the document to the computer, and printing the document

Session 1 – Foundations of Customer Service

Goal – Participants will understand the foundations of customer service.

Objectives –
   A. Participants will describe who is responsible for providing quality customer service.
   B. Participants will explain the benefits of providing quality customer service.
   C. Participants will identify the consequences of providing poor customer service.
   D. Participants will distinguish between internal and external customers.
   E. Participants will differentiate between reactive and proactive customer service.

Materials –
   o Whiteboard/markers
   o Computers with Internet connection
   o Building Customer Service Skills website
   o LCD Projector
   o Printer in classroom (to print completed activities)
   o HO 1 – What Does Great Customer Service Mean to You?
   o HO 2 – Foundations of Customer Service
Facilitator Notes-

**Activity:** Ask participants to take some time to think about a memorable customer service moment they have experienced. Explain that the experience can be a positive or a negative one. *Note: Please be careful to avoid a derogatory conversation about a local business*

Ask all participants (if time permits) to share their experiences. After dividing the whiteboard into two sections, one for positive experiences and one for negative experiences, write the positive and negative experiences on the whiteboard. For the negative experiences, ask the group to brainstorm ideas about how the situation could have been handled differently to make the bad experience a more positive one.

**Debrief:** Once all participants have a chance to share their experiences, tell them that they will learn various techniques for providing quality customer service throughout this course.

Broadcast the web page for Session 1 – Foundations of Customer Service. Participants should also navigate to this page.

Before participants read the Foundations of Customer Service content, instruct them to open **HO 1 – What Does Great Customer Service Mean to You?** Ask participants to type an answer to **Part 1-Pre-Customer Service Training Response**. Be sure to remind participants to save the document because they will be re-visiting it at the end of the course.

Allow participants time to read the Foundations of Customer Service website for an overview of the content.

Once participants finish reading the Foundations of Customer Service section of the course website, broadcast the PowerPoint® - Foundations of Customer Service to facilitate a class discussion.

Customer service is everywhere. Most of us encounter some type of customer service activities during our daily routines. We are exposed to customer service when we go to a store, call a company on the phone, or visit a company’s website. However, just being exposed to customer service does not mean you know how to do it well or how to evaluate whether the level of service you are receiving is acceptable.

Ask students, “What does providing good customer service mean?” Probe students for an answer similar to, “Ensuring customers are satisfied and will continue to buy products or services of a company.” Ask students, “Why do you think this is important?” Probe for an answer similar to, “So customers continue to buy the company’s products or services.” Then, reveal Power Point slide 3 to compare student responses to those on the slide.

Providing adequate customer service means ensuring that customers are satisfied and will continue to buy products or services of a company. To accomplish this, anyone who has any contact with the customer, including salespeople, receptionists, truck drivers, etc. must be concerned with customer service. Employees are the human face of the company for the customer. Everyone must provide the highest level of service at all times, or they could upset customers. Most likely, the customer will fault the company providing the products or services, not the person who made contact with him or her.

Customer service can be either reactive or proactive. Ask students, “What is the difference between reactive and proactive customer service?” Probe for a response similar to, “Reactive customer service is a response to a problem or inquiry, whereas proactive customer service is taking preventative action to prevent a future or potential problem.” Write their responses on the whiteboard. Ask students, “How can you actively help customers?” Probe for responses similar to, “Introduce new products/services to better suit their needs and find ways to help them save money.” Then, reveal Power Point slide 4 to compare student responses to those on the slide.

In a reactive situation, the employee who is providing customer service is responding to a situation that has already
developed. For example, a customer is dissatisfied with his television bill and calls competitors of his service provider for quotes. As soon as he finds the best price, he calls his existing television provider and tells them he wants to cancel his service. The customer service representative on the other line must now take a reactive approach to retain their customer. On the other hand in a proactive situation, the employee providing customer service takes preventative action before a situation occurs. For example, a representative from the satellite company could call loyal customers to offer them discounted rates in an attempt to keep them from switching services.

The definition of customer service becomes even more complex once you realize that there are two types of customers, external and internal. Ask students, “What is the difference between internal and external customers?” Write responses on the whiteboard, while probing for an answer similar to, “External customers are those who purchase the goods or services of a company, whereas internal customers are other employees or vendors of an organization.” Reveal Power Point slide 5 to compare student responses to the ones on the slide.

Ask students, “What are some examples of internal customers at a restaurant?” Write responses on the whiteboard, while probing for a response similar to, “Internal customers at a restaurant could include the wait staff, greeter, cooks, and the manager.” Ask students, “What is an example of an external customer at a restaurant?” Write response on the whiteboard, while probing for the answer, “Customers.” Reveal Power Point slide 6 to compare student responses to the ones on the slide.

In order to appreciate and understand customer service, it's important to realize all of these distinctions. Each customer, internal or external, will expect quality customer service.

Why is Customer Service Important?

Maybe you are thinking, so why is customer service so important? Do you remember the last time you received poor service? We've all been in a situation where we've been unhappy with the service we've received, so it is likely that it was easy for you to recall the last time you received poor customer service. Maybe your waitress seemed to have other things on her mind and was not attentive enough to your needs, or a salesperson was too pushy and made you feel intimidated.

Ask students, “What are the consequences of providing poor customer service?” Write the participants’ responses on the whiteboard and compare their answers to the ones on Power Point slide 7. Regardless of the situation, those experiences leave everyone feeling irritated and cheated. It is likely that if you have other options, you will want to take your business elsewhere. Additionally, you might even warn your friends and family not to do business with them. By providing poor service, the company risks losing their customer and everyone else their customer associates with. The word about poor service usually spreads fast. Customer service is important because when customers have too many negative experiences, they will take their business elsewhere and revenues for the business are lost. When a company loses too much revenue from lack of sales, doors close and jobs are lost.

Ask students, “What are the benefits of providing good customer service?” Write their responses on the whiteboard and reveal responses on slide 8. Note that a benefit of providing good customer service is that the customer receiving the service will tell his or her friends about it. In turn, a company could gain new customers by providing excellent service to an existing customer.

As competition among businesses continues to increase, providing excellent customer service is a way for a company to stand out from its competitors. Consumers have a lot of choices when it comes to selecting their products and services. For example, think about how many different providers you can call for cell phone or television services. It is the same with many products like cars, clothes, shoes, computers, food, drink, etc. Consumers in today’s market have many options. Providing excellent customer service is one way that businesses can gain and maintain a customer base.

Another reason that providing good customer service is important is because it provides employees with a sense of
satisfaction. This satisfaction will help employees build their confidence and motivation to fulfill other goals. Additionally, having fulfilled and satisfied employees helps employers by minimizing turnover and maintaining high morale among employees.

**Activity:** Ask participants to complete *HO 2 – Foundations of Customer Service.*

**Debrief:** Ask for volunteers to share responses (get 2 to 3 responses for each question). Collect *HO 2 – Foundations of Customer Service* to provide credit for completion. Participants can print two copies, one for submission and one for their course portfolio.

**Session Review:** What is an example of reactive customer service? What is example of proactive customer service? What are advantages for a business who offers great service to customers? What do most people expect from employees of a business?

Thank you for your hard work today. I am excited to work with you on developing these skills. In the next session, we are going to work on what you can do to get to know your customer and make a good first impression.

**Session 2 – Getting to Know Your Customer**

**Goal** – Participants will learn techniques for getting to know their customers and making a good first impression.

**Objectives** –

A. Participants will explain the importance of making a good first impression.
B. Participants will identify ways to make a good first impression.
C. Participants will identify strategies to learn about a customer’s needs.
D. Participants will recognize problematic customer service issues.
E. Participants will develop open-ended questions.

**Materials** –

- Whiteboard/markers
- Computers with Internet connection
- LCD Projector
- Printer in classroom (to print completed activities)
- Building Customer Service Skills website
- Index cards
- *HO 1 – Webquest – Making a Good First Impression*
- *HO 2 – Getting to Know Your Customer*
- *HO 3 – Asking Open-Ended Questions*

**Facilitator Notes**

**Activity:** Let’s begin by getting to know a little more about each other. Distribute an index card to each participant and keep one for yourself. On this card, I would like you to write five little known or unusual things about yourself- nothing too personal. Just something that is unique. For example, maybe you collect ugly or weird socks or you play classical music on the violin! Allow 5 – 10 minutes for participants to fill out their cards. Fill one out for yourself, as well.

When everyone has finished, collect the cards. Depending on the class size, you can divide the group in to teams or play as one group. We are going to try to guess whose card this is based on the unusual facts written on it. Note – if you begin with the more unusual details, the game can be more enticing. Begin by reading the first characteristic. If the group guesses correctly with the first characteristic, award the person 1 point; the second characteristic, award 2 points; the third characteristic, award 3 points; the fourth characteristic, award 4 points; and the fifth characteristic, award 5
points.

Did anyone require the group to read all 5 of their unique characteristics? What about only one?

\textbf{Debrief:} Do you feel like you learned some things about others in the group today? Do you feel like you have common interests with others in the group? Similar likes or dislikes? How does what you know about a person affect the way you communicate with him or her? Select an example from the class such as, since you know that Steve plays in a band, would it change the way you communicate with him? If so, how?

Your customers, coworkers, and supervisors aren’t going to provide you with a card that gives you all you need to know about them. You will have to learn these things yourself. Additionally, you may have to learn about a person very quickly.

Broadcast the PowerPoint® - Getting to Know Your Customer slide 2 to review the session objectives.

Broadcast the web page for Session 2 – Getting to Know Your Customer. Participants should navigate to this page as well. Allow the participants to have time to read the web page for an overview of the content.

Broadcast the PowerPoint® - Getting to Know Your Customer beginning with slide 3 to facilitate a class discussion.

\textbf{Getting to Know Your Customer}

As a customer, you know that in today’s competitive market you have many options for buying products and services. It is probably really important to you that you receive at least adequate customer service, or you probably won’t be a customer again in the future, right? Providing excellent service is a way for organizations to gain an advantage over the competition. Happy satisfied customers tend to be loyal and return to do business with their hard earned money. There are many techniques for providing excellent customer service, and you will be learning about several of them throughout this course.

One technique employees can use to offer superior customer service is to get to know their customers, so they can better determine their needs. Getting to know a customer begins with the first interaction an employee has with him or her. Therefore, as an employee, you need to make a good first impression with customers to lay the foundation for building trusting relationships with them.

\textbf{Making a Good First Impression}

Ask students, “How long does it take you to form an opinion of someone?” Once a participant provides a response, use Power Point® slide 3 to reveal the answer. Some experts say you only have five to ten seconds to make a first impression.

(Power Point® slide 4) First impressions are very important because they set the tone for not only the rest of the initial interaction, but also for the longer-term. If an employee makes a good first impression on a customer, it is more likely that their future interactions will be positive. This in turn, will make it more likely that the customer will make another purchase from the business. On the other hand, if an employee makes a bad first impression, it will be difficult to gain the trust of the customer from the very beginning.

Ask students, “What are some of things that form your first impression of a person?” Let’s face it even though you aren’t supposed to judge a book by its cover, what we see makes up a large part of our first impression. So what we show our customers, coworkers, and supervisors is important. What else is there?

Everyone has met someone who was unfriendly from the beginning. How did that person make you feel? Did you want to get to know him or her? Most likely, you did not care to talk with the rude person for very long. If service employees
come across as being unfriendly or rude, there is little to no chance that they will be able to build any kind of relationship or trust with the customer. Consequently, it is doubtful that the potential customer will make a purchase.

Webquest: What are some things you can do to make a good first impression? Divide the group into smaller groups with no more than 3 members. I would like you to complete a webquest and look for videos, articles, or websites that provide advice on making a good first impression. When you find the resource you want to share, record the address and complete HO 1 – Webquest – Making a Good First Impression. As a group you will use the Facilitator’s computer and the LCD projector to share your resource and what you learned from it. Remember to avoid sites like Wikipedia, ask.com, etc.

Allow the groups 20-30 minutes to complete this activity. When every group has completed the activity, reconvene to debrief.

Debrief: Ask for volunteers to come to the Facilitator’s computer to share the resource they located and what they learned about making a good first impression. Give each group the chance to share its resource.

After each group has shared its information, ask the audience for questions or comments.

It looks like you located all of the things you can do to make a good first impression for customers, coworkers, and supervisors. Show students Power Point® slide 5 and compare their responses to the ones on the slide. The most common techniques that employees can utilize to ensure they are projecting a friendly image include,

- Look professional by dressing appropriately for your workplace and maintain good personal hygiene.
- Smile and smile some more even when you are on the telephone. It is difficult to project a negative attitude when you are smiling.
- Leave your personal problems and negative attitudes at home. It is important to have a positive attitude at work. Customers are attempting to fulfill one of their needs or to solve one of their problems, and they are not concerned with your problems.
- Acknowledge the customer with a friendly greeting as soon as possible. This is true whether the customer is with you face-to-face or on the telephone. Many sales are lost because customers are not immediately acknowledged. Even if you are helping another customer, excuse yourself quickly to tell the new customer that someone will be with him or her as soon as possible.
- Use the customer’s name if you know it. There is a good chance you will start seeing some customers over and over. Most people are very impressed when a service person can remember them by name.

Activity: Let’s look at some workplace scenarios that present challenges. Open HO 2 – Getting to Know Your Customer. The group should work on this activity individually. Participants should print two copies, one to certify completion and one for their portfolio. Permit 15-20 minutes to complete this activity.

Debrief: Ask for volunteers to share their responses. Collect one completed copy from each participant.

Determining the Customer’s Needs
Once an employee makes a good first impression and starts to build a relationship with the customer, it is important to try to determine his or her specific needs. Not all customers will require the same product or service, so it is important to determine their particular needs. There are several techniques service employees can utilize to determine their customers’ needs. Use Power Point® slides 6, 7 to review the following:

1. **Listen** to what the customer is saying and give them your undivided attention. Never interrupt a customer, even if you feel like you have already determined his or her need. It is always considered rude to interrupt someone. Listen to everything the customer has to say before making any recommendations or comments or asking any questions.

2. **Observe** the customer carefully. It is possible to get ideas from observing customers. For example, you can tell if
a customer is in a hurry by the way he or she responds to your greeting. You can also look for non-verbal cues such as facial expressions, hand movement, and eye contact for other clues. For instance, if a customer in a retail store is constantly checking price tags, you might want to recommend an item that is on sale.

3. **Ask open-ended questions** or questions that require more than a yes or no response. Sometimes customers will tell you exactly they want, and they just need to be pointed in the right direction. Other times, you will have to ask questions to determine which product or service will best suit the customer. This is when it is important to use open-ended questions to keep the conversation going. For example, don’t say something like, “Can I help you?” Instead, say something such as, “What can I help you find?” Questions such as the latter will help keep the conversation going with a customer, so the employee can determine which product or service will best meet his or her needs. An efficient technique for asking open-ended questions is starting sentences with words such as, “Who,” “What,” “When,” “Why,” or “How.” It is difficult to answer questions that start with those words with a yes or no response.

### Activity

You know that open-ended questions are meant to keep a conversation going and to get you the information you need to assist a customer. Additionally, open-ended questions will help you to develop a positive relationship with customers, coworkers, and supervisors. Asking open-ended questions is challenging, and it can be hard to think on your feet. Let’s do some practice to get better at asking these types of questions. Open and broadcast **HO 3 – Asking Open-Ended Questions** and ask participants to locate and open it as well. Look at the closed-ended questions and as a group brainstorm ways to make the question open-ended.

Ask the participants to form a circle or line in an appropriate part of the room. Any location where there is space will be appropriate. Let’s try a “speed round” of Open – Ended Questions. Imagine that you work in a home improvement store. You’ve just noticed me wandering down the aisle. I’d like each of you to ask me an open – ended question. Start by having the first person ask an open-ended question. Then, have the second person ask a different open-ended question. Each participant must ask an open-ended question that has not been asked yet. If a participant cannot think of a question, he or she should return to his or her seat. If you make it through the entire group, begin another scenario:

**Scenario examples**-
- You are a server at a local diner. I have just come in and sat down at your counter.
- You are the administrative assistant at an apartment rental company, and I have just come in with my two children.
- You are the teacher’s assistant at a preschool. I have just called to enquire about your preschool.
- You are the most experienced delivery person at your office supply company, and you are in charge of training me, the new driver.

Continue the activity as long as there is interest.

**Debrief:** What was the most difficult part of this activity? Participants will likely respond that coming up with a question quickly was a challenge. Remember that when you ask an open-ended question, the person will likely respond with a longer, more detailed response. This response will help you to determine your next question, and it will give you time to form it. Lastly, remember to use the key words- who, what, where, when, why, and how.

**Session Review:** How long does it take for a person to decide what their first impression is of you? Why is making a good first impression with customers important? What are some ways you can make a good first impression with customers? Why is it important to ask customers open-ended questions? What are some words you can use to begin an open-ended question?

Thank you for your work today. In the next session we are going to begin working on ways to provide service above and beyond what the customer expects.
Session 3 – Meeting and Exceeding Customers’ Expectations

Goal – Participants will learn techniques for meeting and exceeding customer expectations.

Objectives –
A. Participants will explain the consequences of not meeting customer expectations.
B. Participants will identify ways to meet and exceed customer expectations.
C. Participants will distinguish the difference between meeting and exceeding customer needs and expectations.
D. Participants will explain the importance of building strong, professional relationships.

Materials –
- Whiteboard/ markers
- Computers with Internet connection
- LCD projector
- Printer in classroom (to print completed activities)
- Developing Customer Service Skills website
- Index cards
- HO 1– What are my expectations?
- HO 2– Webquest – Exceeding Customer Expectations

Facilitator Notes-

Activity: You are a consumer every day. Sometimes you are disappointed with your experience, while other times you may be very satisfied with your experience. In our first activity, I would like you to work with a partner. Consider these three scenarios where you are the consumer at a restaurant, a clothing store, and the dentist’s or doctor’s office. In each of these scenarios, what are your minimum expectations? What would your server, the sales clerk, and your doctor or dentist have to do to exceed your expectations? Open and instruct participants to open the website page Meeting and Exceeding Customer Needs and locate and open HO 1– What are my expectations?

Debrief: Ask for volunteers to share their minimum expectations, and what they would consider service that exceeds their expectations. Discuss by asking questions such as, “What is your impression when service meets your expectations? How does that influence your decision to continue to do business with a company? What about service that exceeds your expectations? Can anyone give an example of a situation where you felt the service you received went beyond what you were expecting?” If the group struggles, provide an example from your own experiences.

Broadcast the PowerPoint® - Meeting and Exceeding Customers’ Needs to review the objectives for this session (Power Point® slide 2).

Broadcast the web page for Session 3 – Meeting and Exceeding Customers’ Needs. Participants should navigate to this page if they aren’t already there. Direct participants to read the content on the Meeting and Exceeding Customers’ Needs section of the course website.

Broadcast the PowerPoint® - Meeting and Exceeding Customers’ Needs starting with slide 3 to facilitate a class discussion.

Today we are going to talk about what you can do in your role with a company to meet and exceed your customers’, coworkers’, and supervisors’ expectations.

Your experiences as a customer tell you how important it is that a company’s employees be concerned with meeting
your needs and expectations. As soon as you come into contact with any employee, that person is the only face of the business as far as you are concerned, right? How many times have you judged a company based on a bad experience with an employee? Customers want to feel like employees of a business care about their personal situation and needs. After all, they are thinking about spending their hard earned money for the company’s products or services.

When a customer’s expectations are not met, what happens (Power Point® slide 3)? Poor customer service affects every employee of a company even those who may never have direct face to face contact with customers. Think about the following scenario. If you work as a stocker, but customers aren’t happy with the service they receive from cashiers or customer service representatives, they will take their business to another company. If your company loses money, you could lose your job even though you had no direct contact with the customer!

Ask students, “What can employees do to ensure that customer expectations are met?” Write their responses on the whiteboard and reveal Power Point® slide 4 to compare answers. At a minimum, customers contact or visit a business expecting that their needs will be met. If customers’ basic expectations and needs are not met, they will become dissatisfied and often take their business elsewhere. Some common customer needs for most businesses include:

- Fast and accurate service
- High quality products
- Competitive prices
- Helpful, friendly employees who are capable of providing information and answering questions
- Prompt responses to inquiries (via phone, e-mail, in the store, etc.)
- Sufficient stock to meet needs
- A clean facility
- Easy to navigate website

In order to provide fast and accurate service, businesses need to have knowledgeable employees. When employees are knowledgeable, they are able to help meet customers’ needs and expectations by providing information about products and services and answering customer questions. As a result, knowledge of the products or services your company offers is an important part of being able to provide adequate customer service.

Customers want someone who can help them solve their problem or fulfill some particular need. Therefore, they want someone who can guide, direct, recommend, or even select the best option for them, so employees need to have solid knowledge of the products or services offered. In a restaurant, the server should know the daily specials. In a retail environment, a greeter should be able to point their customers in the right direction to find the products they are seeking. In a day care center, the teacher’s assistant should know the daily schedule, the curriculum used, and any special certifications or awards offered.

**Activity:** Ask participants, “Do any of you have your cell phone?” From this group, ask for a volunteer. Let’s imagine that you are working at a cellular service provider, and I have come in to purchase a new phone. I am thinking about buying a phone just like this one, but I have some questions for you. Remember, you can also ask me questions. What kind of questions? Open-ended!

- How is the battery life on this phone?
- How is the reception?
- What about dropped calls?
- What are the best features of this phone?
- I am not very tech-smart… How hard is this phone to use?
- What don’t you like about the phone?
- How much is this phone?
**Debrief:** Did you feel comfortable in this scenario? You probably did because your cell phone is something you are really familiar with, right? Ask students, “What information do you need to know about products and services offered by your employer?” You can write their responses on the whiteboard and compare them to the responses on Power Point slide 5 which include, pricing characteristics, how to locate or acquire merchandise or service, options, and manufacturing processes.

When you first begin working for a company you won’t be expected to know every little detail about products or services; however, your employer will expect that you will work on learning these things. What can you do to learn about a company’s products or services?

- Ask a lot of questions
- Pay attention – observe everything
- When time permits, explore products, read about services

**Exceeding Customers’ Expectations**

No matter what your role is with a company, you should always do what is expected of you. That means meeting customers’ expectations, but that also means meeting the basic requirements of the job such as, showing up on time and when scheduled, communicating effectively and appropriately with customers, coworkers, and supervisors, doing your job to best of your ability, and following company policies and procedures.

We talked earlier today about what a server, clerk, and a dentist or doctor could do to exceed your expectations. Remember, this is the customer service that blows you away or really impresses you. Think about your career goal. In that role, what could you do to exceed customer expectations?

Going above and beyond by exceeding customers’ needs is a way for employees to make the business they work for standout from the competition (Power Point® slide 6). Employees who exceed customers’ needs are not only seen as efficient problem solvers by their customers and by their bosses, they are solidifying strong business relationships that can last for years. Customers that receive exceptional service are more likely to frequent a business and tell their friends about it.

Tell participants to take a few minutes to consider the last time they received exceptional customer service. Ask students to consider the following questions. What was exceptional about the service? Is it likely that you will return to the business? Did you tell your friends?

Most likely, the experience stood out in your mind, so you will return to the business and tell your friends and family members about your experience.

There are several ways to go above and beyond to offer customers excellent service (Power Point® slides 7, 8).

- Try putting yourself in the customer’s shoes. Customers’ needs are going to be different. For instance a business person’s needs are going to be very different from a mother’s who has three small children with her even for something as small as a cup of coffee.
- Offer additional products or services (e.g., gift wrapping during the holidays, accept all major credit cards, make food to order, etc).
- Reward customers with gifts (e.g., coupons).
- Save the customer money.
- Be accessible to the customer even after the service is provided. Make sure the customer has your contact information, so they can call or e-mail you with any questions or problems.
- Don’t try to cover up mistakes. If you make a mistake, it is best to admit it and find a way to make it up to the customer. Customers will usually appreciate your honesty and willingness to fix the problem.
- Accept positive and negative feedback and use the negative feedback to take corrective actions and improve
operations.

- Actively seek out unsatisfied customers and find a way to turn around their poor experience.
- Follow up with customers, even when they don’t expect it. Again, customers want to feel that they are important to a business. If an employee has extra time, it is an excellent idea to follow up with customers to see if they were satisfied with their experience. The follow up activity can take place via the telephone, e-mail, or a thank you card.
- Ask customers about ways their experience could be improved and take their ideas to your supervisor. This can be accomplished by simply asking the customer or by using customer surveys.
- Get to know the customer on a more personal level. If you see the same customers often, take notes about people and things that are important to them. Have the notes accessible, so you can review them when you are with the customer. It is always impressive when employees remember important information such as a person’s name, items purchased, the names of their spouse/children/pets, their place of employment, etc.

Use Power Point slide 8 to facilitate a conversation about the importance of getting to know your customers on a more personal level. Remember there are two types of customers, internal and external. It is important to build and maintain solid professional relationships with both types of customers. The majority of all successful businesses have something in common, owners and employees who are good at building and maintaining long-term relationships, not only with external customers, but also with other employees. It is the long-term, loyal customers who will help businesses through tough times, such as economic downturns or strict deadlines.

Many business owners and employees get too wrapped up with the details of the products and services they offer to take enough time to consider the importance of building and maintaining strong, professional relationships with their customers. With the abundance of options and convenience offered by online shopping, businesses need to find a way to draw customers to them. Unless a business offers unique products or services and has little or no competition, building solid relationships is important for success more now than ever before. Offering excellent customer service is one way to start building loyal long-term customer relationships.

The theories behind maintaining loyal, professional relationships are very similar to those of personal relationships. They require time and effort to maintain. Additionally, the relationship must be mutually beneficial. Furthermore, business relationships need to be profitable for both sides. Businesses need to be profitable to be able to pay employees and vendors. When relationships are mutually beneficial and properly nurtured, they are likely to last for years to come.

The rest of this section will focus on ways to nurture relationships with external customers and with other employees. Keep in mind that if employees find ways to consistently make external and internal customers happy, the acts will likely be noticed by the boss!

**Creating and Maintaining Relationships with External Customers**

Excellent customer service begins with personal interaction that makes a customer feel like they are more than just a sales transaction for the company and its employees. There are several techniques most businesses can use to create and maintain long-term relationships with their customers. Ask students, “How can you build strong relationships with external customers?” Write their responses on the whiteboard or ask another student to write them. Then, use Power Point slide 10 to reveal the responses communicate frequently, use customer complaints to repair and re-build relationships, and offer loyal customers rewards.

- **Communicate often with important customers.** It is more important to listen than it is to talk when a customer reaches out. If an employee does not listen carefully to a customer, he or she may not be able to come up with the best solution. Proactive communication is also very important. There should never be a lot of time that passes before communicating with important customers. This might mean following up with customers via e-mail or the telephone regarding larger purchases just to say thank you and to see if they are satisfied with the
product and the service they received. Also, remember that if notes are available to review them before initiating the conversation. Most customers will really appreciate the personal touch. For example, you might end a thank you phone call by saying something like, “Did you enjoy your family vacation to Disney?” Notes like this prove to a customer that he or she was more than just a sales transaction.

- **Use customer complaints to attempt to repair and re-build relationships.** It is always important to be honest and admit when mistakes are made. In fact, successful business leaders understand that a customer complaint is actually an opportunity to improve operations and to build customer loyalty. Most customers will really appreciate receiving an apology accompanied with an action plan to remedy the problem. Furthermore, the complaint can be used to improve the operations of a business, so a similar mistake can be avoided in the future.

- **Offer loyal customers rewards.** Customer rewards programs work well for many types of businesses. For example, many grocery stores offer programs where customers get rewards like store discounts after obtaining a certain number of points. With the right rewards programs, many organizations can ensure that customers rarely shop elsewhere because they want the discounts associated with the reward points. It is important to remember to mention any rewards program to customers who are not already participating. If the company does not have a rewards program for loyal customers, mention the idea to your manager about starting one.

**Creating and Maintaining Relationships with Internal Customers**

Building and maintaining relationships with others at work is not only important for personal success, but it is one of the keys to having exceptional external customer satisfaction. Ask students, “How can you build strong relationships with internal customers?” Write the students’ responses on the whiteboard and use Power Point slide 11 to reveal the answers, communicate effectively and professionally, seek out answers before asking questions, have a positive attitude, and be willing to help others.

- **Communicate effectively and professionally** to develop professional relationships with co-workers. This does not mean that everyone in the workplace should be great friends. Employees need to communicate effectively and professionally, so they can work together to find the best solutions for the business and its customers. In general personal situations should be left at home and conversations at work should be casual and mainly based on work related issues. That means, it is alright to make comments about the weather, but it is not alright to talk about a recent break-up with a significant other.

- **Seek out answers before asking questions.** Employees who take the initiative to solve problems and answer questions on their own tend to be seen as being self-directed and efficient and are considered to be valuable by their co-workers and bosses. Furthermore, self-directed and efficient employees are often considered first when promotions arise.

- **Go the extra mile** whenever possible. Employees who seek more work when they find extra time are indispensable to management and their co-workers. Helping others at work is a great way to build professional relationships.

**Webquest:** We live in the digital age, which has an enormous impact on customer service. Can you imagine how? With consumer satisfaction websites and things like Angie’s List, Yelp, and Urban Spoon, you can immediately let the entire world know what kind of service you received. You can post to Facebook or Tweet about your experience at a business. Of course, consumers do like to complain about poor services or products, but they also like to let others know about good experiences.

Broadcast and direct participants to **HO 2– Webquest – Exceeding Customer Expectations.** We are going to spend some time locating examples of excellent customer service. Participants can work independently or in small groups, depending on class size and preference.

Conduct a search to find an example of a business that exceeded the customer’s expectations. You might find a video,
web posting, or even a news article. When you locate your example, record the website address and explain the actions that the company took to exceed the customer’s expectations. When you have finished, we will share what we found. Remember to avoid sites like Wikipedia, ask.com, etc.

Allow the group 20-30 minutes to complete this activity. When every group has completed the activity, reconvene to debrief.

**Debrief:** Ask for volunteers to come to the Facilitator’s computer to share their example and explain the steps the company took to exceed expectations. Give each group the chance to share its resource.

After each group has shared its information, ask the audience for questions or comments.

Remember that the key to exceeding the customers’ expectations is to put yourself in their shoes. Always ask yourself this question, “What would impress me if I were the consumer?” With this in mind, you will be able to determine what customers expects AND how to exceed their expectations.

**Session Review:** What happens when a customer’s minimum expectations are not met? What information do you need to know about products and services offered by your employer? What are some ways to exceed customer expectations? Why is it important to build strong, professional relationships?

Thank you for all your work today. In the next session, we are going to talk about positive communication with your customers, coworkers, and supervisors.

**Session 4 – Understanding Company Policies and Processes**

**Goal** – Participants will understand the importance of company policies and procedures.

**Objectives** –

- A. Participants will explain the importance of company policies and procedures for internal and external operations.
- B. Participants will provide examples of policies and procedures for internal and external operations.
- C. Participants will summarize the components of a company policy or procedure.
- D. Participants will explain how W-2s, paychecks, and W-4s are related.

**Materials** -

- Whiteboard/ markers
- Computers with Internet connection
- LCD projector
- Printer in classroom (to print completed activities)
- Developing Customer Service Skills website
- Note cards with the following topic (one per card) – Dress code, attendance, reasonable accommodations, substance abuse, workplace safety, employee benefits, equal employment opportunities, Internet usage, leaves of absence, customer returns, and handling customer complaints
- Paper bag
- **HO 1 – Webquest – Policies and Procedures**
- **HO 2 – Sample Paycheck Stub**
Facilitator Notes-

Activity:
To begin, I would like you to think of some examples of work policies or procedures. If the participants have trouble coming up with examples, provide them with a few, including workplace safety, dress code, attendance, etc. Allow students time to do an Internet search if they continue to have problems coming up with examples.

Debrief: Explain to students that today we will be talking about company policies and procedures. Broadcast Understanding Company Policies and Procedures Power Point® slide 2 to review the objectives for the day.

Broadcast the web page for Session 5 – Understanding Company Policies and Procedures. Participants should also navigate to this page. Allow participants time to read the content on the web page.

While students are reading, broadcast the Understanding Company Policies and Procedures Power Point® slide 3 to facilitate a class discussion.

Policies and Procedures
When you begin working, or perhaps you have already experienced this in the workplace, you will see that there are a lot of rules and paperwork involved in running a successful business. You may think that the rules, which companies call policies and procedures are an annoyance, but they are really in place to protect the company, the employees, and the external customers.

Let’s think – what are some things that companies may have policies or procedures for? Participants may site things like attendance, dress code, vacation, or sexual harassment. Why do companies have policies and procedures for these things (Power Point® slide 3)? Policies and procedures are important to a company because they enable managers and their employees to conduct the daily operations of a business in a fair and consistent manner. It is important for employees at all levels to be aware of an organization’s policies and procedures. Well written policies and procedures outline the rules of conduct, responsibilities, and boundaries for employees. Furthermore, consequences for not following the rules will be described in well written policies.

I am referring to the policies and procedures together, but there are some differences. Do you have any ideas what the differences might be?

(Power Point® slide 4) Company policies are more general compared to procedures. They identify the rules of an organization and explain the reason for their existence. Additionally, policies usually describe when a rule should be applied, who the rule covers, and the consequences for non-compliance. Procedures are much more specific than policies, and they provide step-by-step instructions for carrying out a particular action. In addition, a well written procedure will identify job responsibilities and employee boundaries that will help to keep everyone on track and prevent mistakes.

We spent a lot of time talking about how to handle challenging customer situations. This is where business policies and procedures can be very helpful to you as an employee. They tell you how to handle certain situations, and they can help to protect your job.

What are some examples of situations for which a company might have a policy or procedure in place? Participants may suggest situations like a return policy or customer complaints (Power Point® slide 5). Think about the receipts you receive in stores. Most stores print their return policies somewhere on the receipt. What does it say? It usually says something about the time frame you have to return the item. It also may tell you that you can get a refund if you have the receipt and maybe store credit or an exchange if you don’t. This is good because the customer knows the rules and so do you. Of course, a customer may not always abide by the rules, so what do you do then?
It is always important to try to help fulfill your customers’ needs and to do your best to help solve their problems. However, there will be times when you will not be able to fulfill those needs. For example, the store may have a shortage of merchandise or there might be company policies and regulations or even federal and state laws that limit what you can do to help a customer. An important aspect of communicating with customers is having a thorough knowledge of an organization’s policies and procedures, especially those that can directly affect an external customer.

It is especially important for employees to be aware of company policies and procedures that could affect external customers, so they are able to effectively and efficiently communicate them without breaking the rules of the organization. When communicating company policies to customers, it is important to focus on what you can do. Never just tell a customer, “No” or “It’s not my job.” Not every customer request can be fulfilled, but there are creative, friendly ways to avoid saying, “No!”

Most companies or businesses would rather take a small loss over losing a customer. Therefore, if you can’t meet the customer’s need or would have to break the rules to do so, let the customer know that you want to check with your supervisor to see what you can do to fix the situation.

What about company policies and procedures for internal customers? Ask students, “Who are the internal customers of a company?” Internal customers are the employees and supervisors or managers (Power Point® slide 6). The policies for attendance, dress, and leaves like vacation or illness are in place to help you and to ensure that the business operates effectively (Power Point® slide 7). As an employee it is important for you to be aware of the rules and to follow them if you want to keep your job. Breaking rules such as these will surely bring about negative consequences like being reprimanded by your boss or even being fired from your job (Power Point® slide 8).

There are also company policies and procedures that dictate the organization’s obligations to treat its employees fairly. All potential and new employees become subject to these policies and procedures beginning with the hiring process. For example, there are federally mandated policies such as equal employment opportunity, which ensures that all people are given a fair chance of obtaining employment. Once hired, new employees must all have an application on file and fill out other forms such as a W-4, which will ensure that an employee’s tax deductions are taken out of their paychecks properly. Other policies and procedures that help to ensure that employees are treated fairly include, how often employees are paid, accuracy of paychecks, insurance coverage, paid time off, unpaid family leave time, bereavement leaves, etc. We will talk more about these things a little later in the session.

**Webquest:** In a company or business, matters of policy and procedure are typically handled by a group called human resources. A company’s employees are valuable resources, so the staff members of the human resource department all have very important jobs. It is important to treat employees well. Otherwise, they will leave and probably not have very good things to say to other potential employees. Human resources staff are usually in charge of handling things like hiring, payroll, benefits, disciplinary actions, training, and, unfortunately, firing.

They are also the group that writes policies and procedures. These things are often regulated by federal or state laws, so HR staff are specially trained to create these documents.

We are going to put ourselves in the role of an employee in a human resources department. Ask the participants to partner with another person. The small group will then become the HR department. Allow participants to select a human resource issue from the bag. When every group has a note card, broadcast and direct participants to Power Point® slide 9 and **HO 1 – Webquest – Policies and Procedures**.

Use the Internet to research the topic on your card and complete **HO 1 – Webquest – Policies and Procedures**. Please use at least three websites in your quest to ensure that you are getting a broad range of information. Remember to try to avoid sites like Wikipedia, ask.com, etc.
Allow the group 20 – 30 minutes to complete this activity. When all the groups have finished, reconvene the groups to 
debrief.

**Debrief:** Were you able to find at least three websites to provide you with the information you needed to complete this 
activity? Allow each group to share the information they found on their topics.

Some policies and procedures, like for dress, are going to vary based on the company and the work it does. However, a 
lot of policies and procedures are actually based on legal requirements. When you begin working, you might receive a 
book of policies and procedures. If you do, READ it and learn what you need to know to KEEP your job. If you aren’t 
informed about rules or procedures, ask questions and make sure you know the important details.

**Payroll Documents**
The payroll department works very closely with HR. In fact, they may be the same staff. When you begin your job, you 
will complete a lot of paperwork that ensures that you get paid correctly.

When you begin working, one of the first things you will complete is the W-4 form. The W-4 is a standard tax form, 
completed by the employee, which specifies personal information for tax purposes. No one likes to pay taxes, but since 
they are a fact of life, you want to make sure that your taxes are withheld correctly and in a way that benefits you. 
are important. Do not offer financial advice!

Have you ever completed this form before? When you complete this form, you want to be sure you know who is 
claiming you, who you should claim, and what, if any credits you can claim. If you know you will have to complete a W-4, 
you may want to review this document to be sure that you know the correct way to enter information for your unique 
situation. You could even print a copy to practice and take it with you to your new workplace.

What you put on your W-4 directly impacts what you see in your paycheck. Broadcast and direct participants to **HO 2 – 
Sample Paycheck Stub**. Review the sections of the document and the contents. We just expect that our HR and Payroll 
departments will get things right, but sometimes mistakes happen. If something doesn’t seem correct about your 
paycheck stub, check in with your payroll department. If you notice that you weren’t credited for enough hours or that 
you are short in leave time, you should contact Payroll or HR to correct this. By the same token, if you notice that you 
were credited with additional hours or time, make sure to tell the Payroll or HR department. Eventually these mistakes 
are discovered, and it is better to be honest than to have to pay back money in the future.

Tax codes and laws are very mysterious, and most of us would be challenged with figuring out how everything comes 
together. However, if your paycheck is suddenly a lot more or a lot less than what it normally is, and you haven’t gained 
or lost hours, check with Payroll or HR to try to correct the problem.

The final step in the payroll process is the W-2 form. Broadcast and direct participants to [http://www.irs.gov/pub/irs-pdf/fw2.pdf](http://www.irs.gov/pub/irs-pdf/fw2.pdf). Your W-2 is a standard tax form, prepared by the employer, which shows the total wages paid to an 
employee and the total deductions withheld. Have you ever received one of these documents? What did you do with it?

You should receive a W-2 form for each job you held during the year. There are three parts to every W-2 form. These 
parts are actually just copies of your W-2, but they are to be sent to different places:

- **Part A** which you include with your state tax return
- **Part B** which you include with your federal tax return
- **Part C** which you should keep for your own records
When you complete your taxes or have another party do it, like H&R Block, you will use these forms. This is the information that is entered into your federal, state, and local tax forms to determine if you are getting some money back or if you owe any money. If you completed your W-4 appropriately, and you have a bit of luck, you break even. If you get money back, you are in luck. If you owe money, you may want to take another look at your W-4 to make sure you are being taxed appropriately.

**Debrief:** When it comes down to it, we work because we need to make money. When you begin working in your chosen career path, learn the rules of the job to help you keep it and make sure you are earning what you deserve.

**Session Review:** What is the difference between company policies and procedures? Why is it important for organizations to have company policies and procedures?

Thanks for your hard work today. In the next session we will work on developing your skills as part of a team.

## Session 5 – Effective Communication

**Goal** – Participants will understand the importance of effective communication in the workplace.

**Objectives** –

A. Participants will describe the communication process.

B. Participants will differentiate between verbal and non-verbal communication.

C. Participants will explain the importance of communication in the workplace.

D. Participants will describe strategies for active listening.

E. Participants will respond appropriately to challenging customers.

**Materials** -

- Whiteboard/ markers
- Computers with Internet connection
- LCD projector
- Printer in classroom (to print completed activities)
- Developing Customer Service Skills website
- 20 – 30 assorted items for the Warm Up activity- pens, pencils, notepads, water bottles, coffee mugs, staplers, tape dispensers, CD/DVD cases, etc. (Note: you may need more items depending on the number of participants in your class)
- Note cards listing 5-10 of the assorted items on each card
- Items to use as blindfolds (e.g., scarves, bandanas, pieces of fabric)
- Headphones
- **HO 1 – Webquest – Improving Non-Verbal Communication Skills**
- **HO 2 – Active Listening – Audio Activities**
- **HO 3 – Communicating in Difficult Situations**

**Facilitator Notes**-

Before the session begins, place the assorted items you have collected on a table in an open area of the room.

**Activity:** Today we are going to talk about communication. Let’s warm-up with an activity that forces you to communicate and listen very, very well. Divide the class up into teams of two. If there are an odd number of participants, you can create a team of three or ask for a volunteer to help you referee the activity.

Give each team a blind fold and a note card listing some of the items on the table. This game is called, “The Circle.” Team members will rely on each other’s communication and listening skills to retrieve as many items from the table as possible. Within your team, decide who will retrieve first. This person should put on the blindfold. The other team
member, The Communicator, will help The Retriever get to the table, locate an item, and return the item to The Communicator. For example, imagine that Team A’s card lists the following – stapler, day planner, computer mouse, water bottle, and note pad. The Communicator would locate the stapler on the table, tell The Retriever what the item is, and direct The Retriever to it by telling him or her when to walk and whether to move right or left. Once the item is acquired, The Communicator must help The Retriever get back to him or her with the item.

Teams can switch off to allow each member to participate in both roles. The first team to retrieve all the items on its list wins.

Note: This activity may require a different classroom space. Be sure to remove tripping hazards and remind the participants to move slowly and carefully. You and your support referee (if applicable) can help to assure that the game is played safely.

Debrief: Thank the participants for playing the game safely! What role was the most difficult for you? Ask for responses from each participant. What made this role difficult for you? What was the biggest challenge?

Broadcast the PowerPoint® - Effective Communication in the Workplace to review the objectives for this session (Power Point® slide 2). Today we are going to talk about what you need to do to communicate effectively with customers, coworkers, and supervisors.

Broadcast the web page for Session 4 – Effective Communication in the Workplace. Participants should navigate to this page and read the content.

While the students are reading, broadcast the PowerPoint® - Effective Communication in the Workplace starting with slide 3 to facilitate a class discussion.

The Process of Communication
Communication is the process of sending and receiving verbal and non-verbal messages. It starts with someone transmitting information that needs to be received and understood by at least one other person. Communication plays a huge role in our daily lives, as approximately 70% of everything we do requires some type of communication (Power Point® slide 3). Without communication there is very little that can be accomplished (Power Point® slide 4). Nearly every interaction in the workplace requires some type of communication, which is why it is so important to learn to communicate effectively and efficiently. There is no easy solution or formula for effective communication. It is an art, not a science. As mentioned in the last lesson, communicating at work is one of the most important elements for building and maintaining professional relationships. In fact, some form of communication was mentioned while discussing nearly every technique for building and maintaining solid professional relationships with customers, coworkers, and supervisors.

Verbal Communication
Verbal communication is one of the most common functions in the workplace. How limiting would it be if you were not able to speak with your boss, co-workers, or customers? Use Power Point® slide 5 to reveal there are many advantages for communicating a message by speaking, including:

- Immediately solving questions or problems
- Quickly providing more information if needed
- Using non-verbal clues such as voice inflection, pauses, etc. to make your point clearer

When speaking to supervisors, co-workers, and external customers there are several things to keep in mind, including (Power Point® slides 6,7):
- Be specific and make sure you ask and answer questions clearly.
- Provide as much information that you need to fully communicate your message.
- Show respect by treating others the way you want to be treated.
- Use common courtesy by saying things like please, thank you, good morning, etc.
- Manage your anger and emotions because exploding on a co-worker or customer will only cause problems.
- Understand your weaknesses. Asking your supervisor or co-workers for help or advice is alright because no one is expected to know everything.
- Communicate with questions and suggestions, not complaints!
- Volunteer solutions and do not be offended if they are not always implemented.
- Do not discuss your personal life with co-workers or customers; rather hold meaningful work-related conversations.
- Focus on what you can do even though it is impossible to fulfill every request. Find creative ways to say no.

**Non-verbal Communication**

As we communicate with the words we use, we also communicate “non-verbally.” I am sure that you have heard this phrase before. Ask participants, “What are some examples of non-verbal communication?” Participants should note things like body language, tone of voice, and eye contact. When we communicate with customers, coworkers, and supervisors, 7% of the communication is verbal, but the other 93% is nonverbal. This gives us a lot of opportunities to make mistakes in effective non-verbal communication! Let’s explore what we can do to be sure that our non-verbal communication doesn’t send the wrong message.

**Webquest:** We mentioned things like body language, tone of voice, and eye contact as examples of non-verbal communication. I would like you to search for some resources that support developing your non-verbal communication skills. You can use websites, videos, free online courses or trainings, whatever you come across that you like.

Broadcast and direct participants to [HO 1– Webquest – Improving Non-Verbal Communication Skills](#). Participants can work independently or in small groups, depending on class size and preference. Using the resources you find, you will teach the rest of the group what you have learned. Be sure to record the website addresses and make note of what you want to broadcast and what you will be sharing with the group. Remember to avoid sites like Wikipedia, ask.com, etc.

Allow the groups 20 – 30 minutes to complete this activity. When every group has completed the activity, reconvene to debrief.

**Debrief:** Ask for volunteers to come to the Facilitator’s computer to share their resources. Give each group the chance to share its resources and what they learned about improving non-verbal communication.

After each group has shared their information, ask the audience for questions or comments.

Non-verbal communication may seem minor, but it is actually very important. Remember, approximately 93% of our message is non-verbal. Have you ever become annoyed or frustrated with a “rude” employee? Ask a participant for a personal example or share one of your own. When we say, “I will never go back there, the employees are so rude,” we are probably referring to some form of non-verbal communication. Maybe the clerk rolled her eyes or had a snarky tone of voice. Customers will notice if you use negative non-verbal communication, just like you did.

Something as simple as rolling your eyes at a customer could put your job in jeopardy. Put on your best face for your customers, coworkers, and supervisors. Save your eye rolls and snarks for home.

**Active Listening**

The other equally important branch of communication is listening. It doesn’t matter what is said or how it is said if the message is not received.
Being a good listener is an active process. We aren’t just talking about hearing. It requires a lot of effort to actively listen and understand what the speaker is saying. Think back to the Warm Up activity. When you were retrieving items, you had to pay close attention to The Communicator, right? What were some of the things you had to do to receive the message?

In the workplace, you have to do the same things when listening to your customers, coworkers, and supervisors. Each group has an important message that you need to receive and understand in order to do your job well.

How do you know when the person you are speaking to isn’t listening? What are some signs? Participants should mention things like, don’t make eye contact, don’t respond when expected, multi-tasking, playing with phone or computer, watching TV, etc. Great! So what can you do to show your customers, coworkers, and supervisors that you are practicing active listening? Allow participants to make suggestions.

(Power Point® slide 9). There are a couple of key things that you can do.

**Pay Attention** – Give the speaker your undivided attention and acknowledge the message. Recognize that non-verbal communication also "speaks" loudly.

- Look at the speaker directly.
- Put aside distracting thoughts. This is hard, but listen like your life depends on it!
- Don’t mentally prepare a rebuttal! If you are just waiting for your turn to talk, you aren’t listening!
- Avoid being distracted by environmental factors (e.g., side conversations, phone, computer, TV, etc.).
- "Listen" to the speaker’s body language. You will be able to tell if the speaker is angry or anxious.

**Show that You’re Listening** – Use your own body language and gestures to convey your attention.

- Nod occasionally.
- Smile and use other facial expressions.
- Note your posture and make sure it is open and inviting.
- Encourage the speaker to continue with small verbal comments like yes and uh huh.

**Provide Feedback** – Our personal filters, assumptions, judgments, and beliefs can distort what we hear. As a listener, your role is to understand what is being said. This may require you to reflect on what is being said and ask questions.

- Reflect on what has been said by paraphrasing. Examples such as, “What I'm hearing is...,” and "Sounds like you are saying...," are great things to say to reflect on what was said.
- Ask questions to clarify certain points. "What do you mean when you say...?"; "Is this what you mean by...?"
- Summarize the speaker’s comments periodically.

**Note** – If you find yourself responding emotionally or defensively to what someone says, ask for more information. You could something such as, "I may not understand, and I find myself taking what you said personally. I thought what you just said is... Is that what you meant?"

**Defer Judgment** – Interrupting is a waste of time. It frustrates the speaker and limits full understanding of the message.

- Allow the speaker to finish each point before asking questions.
- Don’t interrupt with counter arguments.

**Respond Appropriately** – Active listening is a model for respect and understanding. You are gaining information and
perspective. You add nothing by attacking the speaker or otherwise putting him or her down.

- Be candid, open, and honest in your response.
- Assert your opinions respectfully.
- Treat the other person in a way you would want to be treated.

(Adapted from http://www.mindtools.com/CommSkll/ActiveListening.htm)

**Activity:** Let’s practice active listening. Broadcast and direct participants to the Active Listening – Audio Activities and **HO 2 – Active Listening – Audio Activities.** For this activity you will need the headphones. If headphones are not available, you can broadcast the recordings from the Facilitator’s computer. I’d like you to listen to each recording and take notes on what the speaker has said. Listen to the recording only once and try to get as much information as you can.

Allow participants 10 – 15 minutes to complete this activity. When everyone is finished, reconvene the group to debrief.

**Debrief:** You listened to three different recordings that required you to give the speaker your undivided attention. Let’s see how you did.

In the first scenario, a customer called your restaurant to reschedule an event and make some additional requests. Review the questions for Audio 1. Solicit responses from as many participants as possible.

In the second scenario, a co-worker was updating you on some things that happened while you were on vacation. Review the questions for Audio 2. Solicit responses from as many participants as possible.

In the third scenario, your supervisor was reviewing the tasks you needed to complete on a day you volunteered to work overtime. Review the questions for Audio 3. Solicit responses from as many participants as possible.

What were some of the things you had to do to actively listen to the speakers? How did you do this?

**Activity:** We’ve talked today about what you can do to communicate effectively. It is the most challenging to communicate effectively when you are in a difficult situation. Let’s wrap with an activity that deals some of these challenging situations. Broadcast and direct participants to **HO 3 – Communicating in Difficult Situations.**

Participants should complete this activity individually and print two copies, one to submit to certify completion and one for their portfolios.

**Debrief:** Allow time for at least 2 or 3 participants to share their responses for each question.

Collect one copy of **HO 3 – Communicating in Difficult Situations** from each participant.

Remind participants that they will encounter difficult situations in the workplace. As difficult situations arise in the workplace, the way they communicate with customers, coworkers, or supervisors could leave a really great or a really terrible impression on others.

**Session Review:** What percentage of your time do you think do you spend communicating with others? What are some of the advantages of communicating by speaking? What are some tips for speaking with customers? Approximately what percentage of our communication is non-verbal? What are some examples of ways we communicate non-verbally? What can you do to make sure you’re actively listening?
Thank them for their participation and active listening! In the next session, we will talk about working as a part of a team.

**Session 6 – Working with Team Members**

**Goal** – Participants will understand how effective teams are formed and the roles of team members.

**Objectives** –

A. Participants will explain the benefits of working on a team.
B. Participants will describe the skills necessary to be an effective team member.
C. Participants will summarize the five stages of team formation.
D. Participants will develop ideas for reaching the norming and performing stages for a short-term team project.
E. Participants will describe the team roles.
F. Participants will identify their own dominant and sub-dominant team roles.
G. Participants will write a defense or argument for the dominant team role identified by a questionnaire.

**Materials** -

- Whiteboard/ markers
- Computers with Internet connection
- LCD projector
- Printer in classroom (to print completed activities)
- Developing Customer Service Skills website
- Old bath towels or material cut into 2ft x 2ft squares (number depends on class size, 1 for every 5 people)
- Clock with second hand or a stopwatch
- Scrap paper
- Tape, paper clips, and staplers
- Small prize for Warm Up winner
- HO 1 – Webquest – Team Formation
- HO 2 – Team Roles

**Facilitator Notes**-

Before class begins, lay the towels out in various locations around the room.

Activity: Let’s warm up today with an activity that will involve some teamwork and problem solving to reach a goal. This activity is called “All Aboard.” Divide the group into teams of five. These towels are your team’s lifeboats. You need to find a way to get everyone on the team safely and securely on to the lifeboat. You have five minutes to do this, and you must be able to maintain the position for 30 seconds. When everyone is on board, tell me “All Aboard,” and I will begin timing you.

Direct the teams to their lifeboats and begin timing the activity. Although the first group to complete the task is the winner, allow each group the opportunity to try its strategy.

Debrief: Great job! It looks like you would all survive a nautical emergency! Let’s talk about your experience.

- How did your team decide what to do?
- Did someone become the leader?
- How many strategies did you try?
- How many of these worked?
- What was good about working with a team to meet this goal? Was there anything that was bad about it?

Facilitator will open the Working with Team Members Power Point® slide 2 to review the objectives for the day. In the
workplace, you will be confronted with situations where you have to work as a team with customers, coworkers, and supervisors to reach goals. Today we will talk about what you can do to be a good team member. Broadcast and direct participants to the Working with Team Members page of the course website. Participants should navigate to this page as well. Allow participants time to read the content on the web page.

While students are reading, broadcast the Working with Team Members Power Point® slide 3 to facilitate a class discussion.

What is a Team?

By definition, a team is a group of individuals organized to work together with the common goal to complete a task or project (Power Point® slide 3). Effective teamwork is important for businesses for many reasons, especially because it supports excellent customer service. For example, what kind of teamwork does it take to make a guest at a hotel happy? Allow the participants the chance to suggest examples. The employee at the front desk must be friendly and efficient. If guests have to stand around for a long time with their luggage, they are bound to get irritated. Once the guest checks in, the room needs to be accessible and clean, the food needs to be good, and guest services must know how to fulfill common customer requests effectively and efficiently. In other words, every staff member at the hotel must work together to provide the customer with the best possible service, so he or she is happy and comfortable while staying at the hotel.

Benefits of Working as a Team

In the Warm Up activity, you discovered that working as part of a team has its benefits (Power Point® slide 4). There are many benefits of being a part of a team. First, newer employees learn faster on the job when there are more experienced team members who are willing to teach them. Secondly, the best solutions are often derived from teams because they are able to generate more creative ideas from various team members. Additionally, the workload is distributed among team members, which allows individuals to concentrate on doing their job well. Lastly, individuals working on a team build lasting bonds with each other. This happens especially fast when working under difficult conditions, such as handling angry customers, working long hours, etc.

Sometimes being a part of a team can be frustrating; however, that happens when either you or another team member doesn’t have teamwork skills. Let’s think about these skills. In your opinion, what skills do you want your team mates to have? Write the participants thoughts on the white board.

Skills for Effective Teams

(Power Point® slide 5) Working as a part of a team can be very challenging, but it can also be very rewarding. The best teams are comprised of unique individuals with various strengths and weaknesses. Conflicts are often inevitable because individuals in an effective team will have differences in opinions and values. However, when properly managed, it is the varied strengths and weaknesses and differences in opinions and values of the group that makes it possible to generate the best possible ideas and solutions. If there are poor communicators on a team, it impedes progress and leaves team members feeling resentful, confused, and/or misunderstood. There are a few skills that individuals can work on to help improve their chances of being an effective team member, including:

- **Active listening** - it is important to actively listen to others’ ideas and suggestions.
- **Questioning** - it is important to ask questions, interact, and discuss the objectives of the team.
- **Persuading** - individuals are encouraged to exchange, defend, and sometimes even rethink their ideas.
- **Respecting** - it is important to treat others with respect and to support their ideas. In other words, treat others the way you want to be treated.
- **Helping** - it is crucial to help co-workers. Chances are you will need their help sometime in the future. Most likely, the co-worker will remember the favor, and he or she will be more than happy to help you in the future.
- **Sharing** - it is important to share ideas with your team members and to encourage others to share their ideas. The best solutions are formed when people feel empowered to share their ideas.
Think about any negative experiences you have had working as part of a team. Did those experiences happen because some of these skills were missing? What was missing? Ask a participant to share an experience or share an experience of your own.

Forming a Team

If you have ever been placed with a group of people and were told you were a team, you know that the “team” just doesn’t magically form. You know you have to put work into becoming a team, right?

As a group of people develops into a good team, it actually goes through several stages of development, or stages of team formation. The stages are so common, that people actual study and research the process. (Power Point® slide 6) Bruce Tuckman developed the common model of the stages of team formation. When a group of people come together to form a team, they commonly go through five stages, including:

- Forming
- Storming
- Norming
- Performing
- Adjourning and transforming

(Tuckman Model, Tuckman, Bruce (1965) “Developmental sequence in small groups” Psychological Bulletin, 63, 384 – 399)

Webquest: Broadcast and direct participants to HO 1 – Webquest – Team Formation. Ask participants to form small groups of 3 – 4. I would like all groups to research the different stages of team development. Based on what we have discussed, how would you begin searching for information? What are some search terms you can use? Write the participants’ suggestions on the white board. Be sure that “Tuckman’s model,” “Bruce Tuckman,” and/or “Team formation” are included in the suggestions.

Write your own descriptions of each of the stages of team development.

Allow the groups 15 – 30 minutes to complete this activity.

Debrief: Review the characteristics for each of the stages. Ensure that each group has the chance to share what they found. If a team cites unique information, ask for the website. Write the groups’ responses on the whiteboard or a flip chart. When you have reviewed all of the stages, refer back to and broadcast the Power Point® Working with Team Members. Let’s see what the experts say compared to what you found.

(Power Point® slide 7) Stage 1 – Forming

In the first stages of team building, the forming of the team takes place. The team meets and learns about the opportunities, challenges, agrees on goals and begins to tackle the tasks. Team members tend to behave quite independently. They may be motivated but are usually relatively uninformed of the issues and objectives of the team. Team members are usually on their best behavior, but they are also very focused on themselves. Mature team members begin to model appropriate behavior even during this early phase. Sharing the knowledge of Tuckman’s model can be extremely helpful to the team members.

(Power Point® slide 8) Stage 2 – Storming

The second stage is chaotic vying for leadership and trialing of group processes. Every group will then enter the storming stage with their ideas to compete for consideration. The team addresses issues such as what problems they are really supposed to solve, how they will function independently and together, and which leadership model they will accept. Team members open up to each other and confront each other’s ideas and perspectives. In some cases storming can be resolved quickly. Other times, the team never leaves this stage. The maturity of some team members usually determines
whether the team will ever move out of this stage. The storming stage is necessary for the team to grow. It can be controversial and unpleasant to members of the team who are averse to conflict. Tolerance of each team member and their differences needs to be emphasized. Without tolerance and patience the team will fail. This phase can become destructive to the team and will lower motivation if allowed to get out of control.

(Power Point® slide 9) Stage 3 – Norming
If a team gets out of the storming stage, the group will then enter the third stage of team development. In this stage, team members adjust their behavior to accommodate each other as they develop work habits that make teamwork seem more natural. Team members often work through this stage by agreeing on rules, values, professional behavior, and shared methods. During this phase, team members begin to trust each other. Motivation increases as the team gets more acquainted with the project. The danger of this stage of team development is that members become too agreeable, which can stifle creativity.

(Power Point slide 10) Stage 4 – Performing
The group practices its craft and becomes effective in meeting its objectives. Some teams will reach the performing stage. These high-performing teams are able to function as a unit as they find ways to get the job done smoothly and effectively without inappropriate conflict or the need for external supervision. Team members have become interdependent. By this time, they are motivated and knowledgeable.

(Power Point® slide 11) Stage 5 – Adjourning and Transforming
Adjourning is the process of "unforming" the group, that is, letting go of the group structure and moving on. The process of transforming takes place when a group member leaves the group or when a new person enters a group. Even the most high-performing teams will revert to earlier stages in certain circumstances. Teams that are established for a long time will go through these cycles many times as they react to changing circumstances. For example, a change in leadership may cause the team to revert to storming as the new people challenge the existing norms and dynamics of the team.

Great job! You will find that when you enter the workplace, the people you work with may be in different stages of team development. Additionally, your entry into the team may throw off the development. Keep in mind the characteristics of a good team member, which includes:

- **Active listening** - it is important to actively listen to others’ ideas and suggestions.
- **Questioning** - it is important to ask questions, interact, and discuss the objectives of the team.
- **Persuading** - individuals are encouraged to exchange, defend, and sometimes even rethink their ideas.
- **Respecting** - it is important to treat others with respect and to support their ideas. In other words, treat others the way you want to be treated.
- **Helping** - it is crucial to help co-workers. Chances are you will need their help sometime in the future. Most likely, the co-worker will remember the favor, and he or she will be more than happy to help you in the future.
- **Sharing** - it is important to share your ideas with the team members and to encourage others to share their ideas. The best solutions are formed when people feel empowered to share their ideas.

If you practice these things, your entry into the team will be easier. I can’t promise that everyone on the team will be practicing these skills, but you can only be responsible for yourself. So be a part of building a good team rather than resisting it.

**Team Roles**
The stages of team development are important, but just as important as the stages are the team roles that members in the group take. Let’s try another activity to begin looking at the team roles. Broadcast and direct participants to **HO 2 – Team Roles**. Answer question 1, but just question one and then minimize this document. We will come back to it later.

**Activity:** Ask the participants to form their own groups of 4 – 5 members. Give each group 10 pieces of scratch paper and an assorted collection of paper clips, tape, sticky tack, and staplers (if you have enough). Your goal is to build a
model home out of the materials you have here. Let’s see who can finish first.

Allow the group 10 – 15 minutes to complete the activity. Conclude the activity when the first group finishes. Ask the winners to share their model. Ask the other groups to share their progress as well.

**Debrief:** In your groups you probably took on certain roles.
- Who was the leader of your group?
- Did more than one person take this role?
- If more than one person was the leader, how did they work together?
- Did anyone feel like they took on a different role? What was it? Describe it?

There are defined group roles. Sometimes you take on the role that best suits your personality. In other situations, you may have to take on a role that is uncomfortable for you.

**Belbin’s Nine Team Roles**

Broadcast and direct participants to maximize *HO 2 – Team Roles*. You probably have a pretty good idea about what your natural team role is, but let’s do an activity that may provide you with some more information about this.

Broadcast and direct participants to the team role questionnaire at [http://www.123test.com/team-roles-test/](http://www.123test.com/team-roles-test/). Review the questionnaire background. Look through this list of descriptive words and select the ONE that is MOST like you MOST of the time.

Complete the questionnaire. Enter your demographic information and then get your results. When you have your results, complete *HO 2 – Team Roles*.

Allow the group 10 – 15 minutes to complete this activity. While the group is working, use large flip chart paper to post the team roles around the room. As participants complete the activity, ask them to print two copies of their results, one to submit for certification of completion and one for their portfolios and then go and stand or sit need their dominant role.

**Debrief:**

Let’s talk about the results. Broadcast Power Point® slide 13 (continues on slide 14). Dr. Meredith Belbin and his research team started observing teams to examine the reasons some teams are successful and others are not. They wanted to control the dynamics of teams to discover if and how problems could be avoided. Belbin and his researchers learned that the difference between success and failure for a team didn’t depend on things like intellect, but more on behavior. The research team began identifying the nine roles. People will almost always have a dominant role and sub-dominant roles. As you read about the nine roles. Which one do you think fits your personality the best?

1. **Plant/Chairman** is a person that is “planted” in each team. This person tends to be highly creative and good at solving problems in unconventional ways. This person is often called the team leader.
2. **Monitor Evaluators/Analysts** are needed to provide a logical eye, make impartial judgments, and to consider the team’s options in an objective way.
3. **Coordinators/Executives** are needed to focus on the team’s goal, draw out team members, and delegate work appropriately.
4. **Resource Investigators/Explorers** are needed to explore opportunities and develop contacts. They also provide inside knowledge on the opposition and make sure that the team’s ideas are transferrable outside of the group.
5. **Implementers/Innovators** are needed to plan a practical, workable strategy and carry it out as efficiently as possible.
6. **Completer Finishers/Completers** are most effectively used at the end of a task, to scrutinize the work for errors, subjecting it to the highest standards of quality control.
7. **Team Workers/Team Players** intervene to avoid potential friction between team members. They tend to keep the team’s morale high and enable other members of the group to effectively contribute. Furthermore, team workers are good listeners, cope well with awkward people, and are very sociable people.
8. **Shapers/Drivers** provide the necessary drive to ensure that the team keeps moving towards their end goal and does not lose focus or momentum. A shaper is committed to achieving the end goal and will often encourage other members to be focused on achievement of the end goal.

9. **Specialists/Experts** are individuals with in-depth, rare knowledge of a key area. They tend to be shy and anxious, but they are also very committed and motivated.


**Debrief:** So we can see where we all fall. Do you agree with your results? Does anyone REALLY disagree with his or her result? If two roles were equal percentages, the participant can select his or her preference.

Based on these results, we are going to get into groups that you will work in for the next two days. Based on the number of participants, divide the participants into two or more groups. Make your best attempt to create groups with various dominant roles.

**Session Review:** What are some of the benefits of working on a team? What are some of the skills necessary for effective teamwork? What are the five stages of team development?

Thank you for your work today! Tomorrow we will get started on your team projects. When you come tomorrow, sit with your team.

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**Session 7 – Developing Presentation Skills (Day 1)**

**Goal** – In small groups, participants will create and deliver an effective presentation.

**Objectives** –

A. Participants will describe the elements of an effective presentation.
B. Participants will work as part of a team to analyze a customer service challenge or business problem.
C. Participants will work as part of a team to develop a corrective action for a customer service challenge or business problem.
D. Participants will work as part of a team to develop and deliver the corrective action as a team presentation.

**Materials** -

- Whiteboard/ markers
- Computers with Internet connection
- Micro Soft® Office tools like Power Point® and Word®
- LCD projector
- Printer in classroom (to print completed activities)
- Developing Customer Service Skills website
- Poster board
- Markers or colored pencils
- **HO 1 – Webquest – Presentation Tips**
- **HO 2 – Presentation Evaluation**
- **HO 3 – Group Scenario 1**
- **HO 4 – Group Scenario 2**
- **HO 5 – Group Scenario 3**

**Facilitator Notes**–
Before class begins, print **HO 3 – Group Scenario 1, HO 4 – Group Scenario 2, and HO 5 – Group Scenario 3**. Groups will select one scenario at random later in the session.
**Activity:** Think back, have any of you ever had to give a presentation to a group, large or small? Ask for a volunteer to share his or her experience.

- What was the presentation about?
- Where did you do it?
- What did you do to prepare?
- Did you have to make or build anything?
- What was the most challenging part of the presentation?
- How do you think you did?
- How did your audience respond?

**Debrief:** Today we are going to begin working on a team project. For this project, you will present your information to the rest of the group. When I was preparing to teach this class, I examined the website and looked closely at the Facilitator’s manual and all of the handouts. I also had to gather materials for us to use like the towels for “All Aboard,” the blindfolds and objects for the, “Circle”, and the items to make the model houses. I had to make sure I had computers for everyone and the other things needed for class to be successful. That was just the beginning. I had to be ready to present this information to the class. That was the hardest part.

Open, broadcast, and direct participants to the Presentation Skills Power Point® (Power Point® slide 2) to review the objectives for the class.

Broadcast and direct participants to the Developing Presentation Skills page of the Developing Customer Service Skills website. Participants should also navigate to the website. Allow participants time to read the content.

**Presentation Skills**
It is important to know how to give effective presentations. You may be asked to make a presentation to help new employees learn the job faster, to educate potential customers about the company’s products and services, or to make your case for trying a new idea or solving a problem. Today and tomorrow, you are going to work in your groups to solve a workplace challenge and present the problem and solution to the rest of the class.

**Webquest:** Before we get started, let’s talk about what an effective presentation looks like. Direct participants to the presentation resources on the Developing Presentation Skills page of the course website. Work in your groups to research these websites. Broadcast and direct participants to **HO 1 – Webquest – Presentation Tips**. Record what you learn on this document, so you can refer back to it when we discuss what you have learned.

Additionally, make sure to check out at least one general presentation tips website and one creating effective visuals website.

Allow participants 30 – 45 minutes to complete this activity. Circulate while the groups are working to provide assistance and answer questions.

When all of the groups have finished the activity, reconvene to debrief.

**Debrief:**
Let’s talk about what you learned. Ask each group to share at least three things that they learned about creating effective presentations. Ask a participant to take notes on the white board. When all of the groups have shared their research, broadcast and direct participants to the Presentation Skills Power Point® beginning with slide 3 to facilitate a class discussion.

**Developing and Delivering a Presentation**
General tips – There are some key points to keep in mind while you are developing and delivering a presentation (Power
Point® slide 3), including:

- Think about your audience. Try not to insult their intelligence, but don’t talk over their heads.
- Remember who you are talking to. You may have a diverse audience. It is important to be respectful of these differences.
  - Male/female
  - Age
  - Skill level
- Try to keep your presentation on track.
  - Take questions at designated points.
  - If you have audience or group activities, keep them on task.
  - Be clear about your expectations.
- Do you remember how I told you I prepared for these classes? Being prepared is important.
  - Know your materials.
  - Organize your materials.
  - PRACTICE

Being nervous is natural and common (Power Point® slide 4). A lot of people fear speaking in public. There is a word for this, and it is glossophobia. Your audience is usually on your side. If you are miserable, they will be too. So just take a deep breath and have fun with your topic. Keep your sense of humor.

We talked about eye contact in the Effective Communication session. This is important when you give a presentation, too (Power Point® slide 5). Good eye contact makes the audience feel involved, and it makes them trust you and believe what you are telling them.

Again, as mentioned in the Effective Communication session, body language is important (Power Point® slide 6). Review the information on slide 6. A lot of us fidget when we speak. If you think you might do this, give yourself something to prevent it. Hold a pen or pointer in your hand. Also, smiling is more important than you think. If you have to deliver unpleasant news, delivering it with a sympathetic smile can go a long way towards making the news less harsh.

(Power Point® slide 7) Another important element of effective communication that you must consider when doing presentations is your voice. That is, you must speak clearly and loudly, and you should inflect your voice to show enthusiasm. Do you remember the last time someone spoke to you in a monotone voice for a long period of time? Was it hard to pay attention? There are a few other things you should remember not to do during presentations including, not speaking too slowly or quickly, and you should never chew gum.

Using Visual Aids
Visual aids can really add to your presentation. This course has many visual aids with the big one being the class website, which was used to hold all of the necessary materials.

In the presentation you create, I want you to use any visual aid you want. You can create handouts; you can use poster board and markers or colored pencils to draw diagrams or pictures; you can use MS® Word to create your visual aids; or you can use MS® Power Point to organize your presentation. This is your chance to be as creative as your team chooses to be.

When preparing your visuals, think about things like these (Power Point® slide 8). If you find a video online or you would like to record one with your phone, you can do that. (Note: If participants want to record a video with a smart phone, they would just need to bring their auxiliary cords to class to transfer the video to a computer. Participants should try practicing this first, as all smart phones transfer videos differently and with different degrees of success and clarity. You can do a Google search for information on how to transfer video.)
Note: The more tools you provide to develop the presentations, the more creative participants will be. You are encouraged to offer participants as many practical tools as you would like as long as they are available and permitted at your site.

Effective Visuals
Be sure that your visual aids enhance your presentation (Power Point® slide 9). As you are creating your visuals, make sure that they meet these goals. Review the information on the slide.

Presentation Evaluation
To complete this presentation project, you will get to evaluate each team’s work. Broadcast and direct participants to 

Presentation Evaluation. Review the content of the evaluation. Of course, this document will be important to the audience. Ask students, “How is the rubric important for the group delivering the presentation?” Take a look at the document. This is what you need to do well to get a good evaluation from the audience. As you are developing and practicing your presentation, evaluate yourselves based on these criteria.

Based on the audience feedback and your own thoughts on your work, your team will write a brief summary about your experience (Power Point® slide 10).

Group Presentations
Broadcast and direct participants to Power Point® slide 11. In a few moments, your group will receive a scenario to analyze. Just to review the expectations for your presentations, you must include:

1. Explanation of the problem
2. Corrective action, how it was derived and what it was
3. Company policy that will help prevent future reoccurrences
4. One or more visuals for the audience
5. Participation by all group members
6. Minimum of 10 minutes, maximum of 15 minutes

Retrieve Group Scenario 1, Group Scenario 2, and Group Scenario 3. Assign one of the three scenarios to each group. Please do not discuss your scenarios. With any time that remains, groups may begin working. You can circulate during this time to provide support.

Session Review: What are some general tips for giving an effective presentation? What are some tips for creating effective visuals for your presentations?

Tomorrow you will finish and present your group’s work to the rest of the class. We want to allow about an hour for the actual presentations, so come tomorrow prepared to work efficiently. Thank you for your great work today!

Session 8 – Developing Presentation Skills (Day 2)

Goal – In small groups, participants will create and deliver an effective presentation.

Objectives –
A. Participants will describe the elements of an effective presentation.
B. Participants will work as part of a team to analyze a customer service challenge or business problem.
C. Participants will work as part of a team to develop a corrective action for a customer service challenge or business problem.
D. Participants will work as part of a team to develop and deliver the corrective action as a team presentation.

Materials -
Facilitator Notes-
When participants arrive for this session, they should begin working immediately. During this activity, your role as a facilitator is to provide support and suggestions. Most importantly, you need to ensure that the groups are working efficiently and effectively. Help the groups to stay focused on the task and do not let them dwell on any one particular challenge for a long period of time. Support the groups with finding solutions. You may want to provide a countdown to help groups stay on task. For example, “You have 45 minutes to complete your presentations.”

The time you will need for the groups to deliver their presentations depends on your class size. To be cautious, allow 15 minutes for each group presentation and an additional 10 minutes for the audience to complete their evaluations.

Group Presentations
When the groups are ready, ask for a group to volunteer to go first. You may not get a volunteer, so select a group. As each group completes its presentation, ask the audience to complete their evaluations. Print two copies of the evaluations, one for submission and one for the group. Collect the evaluations before you distribute them to the presenters.

Evaluation
After all the groups have finished, distribute the evaluations and give the groups a chance to review the information.

After you get chance to review the evaluations, I would like you to type a brief summary of your experience. Write your summary using complete sentences. Based on your own thoughts and feedback from the audience, the summary should include information on what you think went well and what you would like to improve on for future presentations. Print one copy for each member of your group for your portfolios and one to submit to me. Be sure to include all of the names of all group members.

Session Review: Thank you for the great presentations! I hope in this activity you had some opportunities to learn about yourself as a team member and a potential employee. Solicit responses from the group on the following questions:

1. What do you know now that you didn’t know before?
2. What attitudes and feelings do you have about your skills that you didn't have before?
3. What part of this project was most valuable for you?
4. How has this group been helpful to you?
5. How have you contributed to this group?

Try to encourage reluctant participants to share their thoughts.
Session 9 – Career Advancement

Goal – Participants will learn strategies to advance in their intended careers.

Objectives –
A. Participants will research career paths that match their interests and qualifications.
B. Participants will identify the education or training, skills, abilities, and personality traits that are necessary for their intended career paths.
C. Participants will describe ways to proactively seek career advancement with their current (or future) employer.

Materials –
- Whiteboard/ markers
- Computers with Internet connection
- LCD projector
- Printer in classroom (to print completed activities)
- Developing Customer Service Skills website
- HO 1 – Career Exploration

Facilitator Notes-

Activity: You probably have some different careers in mind that interest you. Just to see, what are some of the careers that you are considering? What appeals to you? Allow each participant a chance to respond.

Debrief: Often when we begin working we don’t really start out exactly where we want to be. We may begin at what is called an entry level position. Think of this as the first step on a ladder. We can choose to stay in the position, or we can work to advance the career and move up the ladder.

Activity: What are some of the benefits of career advancement? Write the responses on the white board. Participants may suggest things like a better job, more/less hours, more money, a better schedule, health care benefits, 401K or retirement, bonuses, profit sharing, etc.

Debrief: As you can see, there are many benefits to advancing in your career.

Open and broadcast the Career Advancement Power Point® (Power Point® slide 2) to review the objectives for the class.

Broadcast and direct participants to the Career Advancement page of the Developing Customer Service Skills website. Tell students, “Today we are going to talk about where you are beginning your career and what you can do to advance up the career ladder in your chosen field.”

While students are reading, broadcast the Presentation Skills Power Point® slide 3 to facilitate a class discussion.

Career Ladders
A career ladder is exactly what it sounds like. It is the steps, or positions/jobs, that you may have as you advance in your career.

**Activity:** This site lists several examples of career ladders for different occupations, some that are popular and in demand in our area. Select a ladder or two that is a high priority in your region or a popular career choice. Review the content of the ladders and make sure to do a comparison of the job descriptions at different places in the ladder.

**Debrief:** Ask for volunteers to share one of the career ladders that interested them. Have the volunteers go up to the Facilitator’s computer to broadcast the career ladder they found the most interesting.

**Career Advancement**
Everyone likes to be rewarded for their hard work. You get a sense of accomplishment when a boss, co-worker, family member, or friend praises your work or says something as simple as, “Good job!” Financial rewards, such as bonuses and raises increase your sense of accomplishment even more. However, most people need more than words and financial incentives to feel as if they have met their full potential.

Many people want career advancement opportunities, such as promotions with increased responsibilities, so they feel like they are making progress in their lives. Few people are able to advance their careers on pure luck. Career advancement usually requires a lot of planning and preparation. Not only must you plan and prepare for career advancement, you must formulate a plan and implement it (Power Point® slide 3).

(Power Point® slide 4) Do you already have a job? If so, are you being challenged? Are there opportunities for advancement at your current job? If you answered no to either of these questions, you may want to consider looking for work elsewhere. Many experts agree that the best time to look for a job is while you are already working. If you already have a job ask yourself, “Is this job what I really want to do for the rest of my life?” Even if you already have a job, many people are not sure what they would like to do for the rest of their lives. There are many career exploration tools on the Internet that can be used to assess career possibilities.

On the other hand, some of you may already have a job that challenges you and has the potential for career advancement. If so, consider yourself lucky and proactively position yourself for promotions.

**Activity:** Talk with the person seated next to you. In your pairs, try to come up with five things you could do to advance your career. Write down your thoughts.

Allow the pairs 5 – 10 minutes to complete this activity. When all of the pairs have finished, reconvene the group to de brief.

**Debrief:** Ask each pair to share two of their ideas. Write these on the whiteboard, or ask for a volunteer to do this.

Great job! You have come up with a lot of good ideas that would help you advance in your chosen career. According to the experts, there are seven big things you can do (Power Point® slide 5), including:

1. **Be reliable** by not missing work and by being there on time each day.
2. **Talk with your supervisor** about potential job growth within the organization. Let him or her know that you are interested in furthering your career, and tell your supervisor about your goals. Ask him or her which skills are necessary to advance your career.
3. **Volunteer to do additional work or help other departments.** Your co-workers will likely appreciate you for the extra help. If you help people in other departments, not only will they be grateful, but you will also learn valuable information about the overall operations of the organization.
4. **Constantly work on and improve your verbal and non-verbal communication skills.** Always be friendly, listen carefully, and communicate clearly in the workplace and your bosses and co-workers will notice.
5. **Be creative** and try to find better ways to do things around the workplace. Keep in mind the concepts of reducing unnecessary steps in processes and procedures. The elimination of waste means increased productivity.
and happy bosses.

6. **Further your education** to gain the skills necessary for career advancement once you identify them by talking with your supervisor. Many employers even have tuition reimbursement programs that will pay for your classes.

7. **Find a mentor** who has extensive knowledge of the workplace operations. This person can serve as a valuable resource when you have questions or work-related problems.

Broadcast and direct participants to *HO 1 – Career Exploration*. Today we are going to do some guided career research (Power Point® slide 6). Make sure you carefully follow the detailed instructions on this handout. It will guide you through a helpful career exploration website. Then, you will use your results to navigate your way through a website used for job searching. Keep in mind that most job search websites have similar functions. In other words, once you can effectively use one job search website, most likely you will be able to navigate others as well.

Enter your responses into *HO 1 – Career Exploration*. When you are finished, print two copies, one to submit to certify completion and one for your portfolio. Also, print and include your profile from O*NET and put it in your portfolio.

Allow participants 45 – 60 minutes to complete this activity. While the participants are working, your role as a facilitator is to circulate and provide support, ask questions, and encourage participants to do further research on their chosen career ladders.

When all participants have completed the activity, reconvene the group to debrief.

**Debrief:** (Power Point® slide 7) Let’s review what you learned about your career path and advancement. If time and class size permits, allow each participant to answer the following questions:

- Based on your work, what career is most appealing and appropriate for you?
- Why is this career a good match for you? Think about knowledge, skills, and abilities.
- What kind of education do you need for this job?
- Do you have what you need, or do you need more? Locally, where could you go to get the education/ training you need?
- What is the regional outlook for this job? What about statewide?
- What is the pay like?
- Think about the career ladder. Where does your career goal fall? If you need to start in an entry level position, what would it be? What would the top of the ladder be?

Great job with this activity! Does this give you some guidance about your next steps? Remember, most successful people don’t start at the top of the career ladder. There are a couple of pretty famous people who did this. Consider for example, Ben and Jerry. You know the ice cream guys, right? They were friends in college, but they both dropped out. They were struggling in their careers when they met up years later. They decided to open an ice cream shop. They paid $5 for a course to learn how to make ice cream. Then, they ended up selling their company for $326 MILLION dollars! Close to home, there is Milton Hershey. He dropped out of school in the 4th grade and went to work as an apprentice to a candy maker. He tried to start several businesses, but they all failed. He kept working, and we know how this turned out. He sold a caramel factory for $1 million before he started his chocolate company!

Someone else you may be familiar with is Puff Daddy, Sean Combs. He started out as an intern at a record company, and now he is worth $550 million!

If you are really invested in a career, don’t be afraid to start at the bottom!

**Session Review:** What does it take to advance most careers? Once you get a job with an employer, what can you do to proactively seek career advancement?
Thanks for your work today! In our last session we are going to talk about some final things that you can do to reach your employment goals.

Session 10 – Using Math, Reading, Writing, and Problem Solving Skills in the Workplace

Goal – Participants will understand the relevance of math, reading, writing, and problem solving skills in the modern workplace.

Objectives -
A. Participants will explain the academic skills needed for employment in their anticipated career.
B. Participants will identify proofreading strategies.
C. Participants will evaluate their math, reading, writing, and problem solving skills.
D. Participants will explain how the Career Readiness Credential® can influence the job search and hiring processes.
E. Participants will determine the Career Readiness Credential® level needed for different customer service careers.

Materials –
- Computers with Internet access
- Building Customer Service Skills website
- LCD projector
- HO 1 – Sample – Career Readiness Credential
- HO 2 – WorkKeys® Practice Answer Sheet (available on the website)
- HO 3 – CareerLink® WorkKeys®/CRC Brochure

Facilitator Notes-

When you graduated from high school or received your diploma, did you think that you would ever use some of the things you learned in your reading, writing, and math courses again? Sometimes we fall into the trap of thinking “I will never use this again.” But, in fact, this is NOT true. The modern job place requires a certain level of skill in math, reading, writing, and problem solving.

Not all jobs require you to be the valedictorian of your class, but employers do expect that you have basic skills. An employer can train a new employee on how to operate the cash register and to use the computerized inventory system. However, if that new employee lacks basic skills, he or she will struggle to learn how to do these things. A new employee is an investment for an employer, so the employer needs to be sure that he or she is making a good investment.

Think about the different careers in the customer service industry that we talked about over the past two weeks. How would you use math, reading, writing, and problem solving skills in these careers? List some of the careers on the white board (e.g., customer service representative, waitress, day care worker, cashier, receptionist, CNA, delivery person, etc.).

Activity: Ask participants to brainstorm ways these workers use math, reading, writing, and problem solving skills.

Debrief: Make columns on the white board and write down the participants’ ideas, or ask a participant to write them. Emphasize that every career requires some level of basic skills.

If you were applying for a job as a delivery person for an office supply company, how could you prove that you have good basic skills? You could show your high school diploma or Commonwealth Secondary Diploma. You could show your Certificate of Completion for this course. What else can you do? What do you have that proves you have the basic skills?
to do the job?
The first thing you do that demonstrates your basic skills is completing an application! What does it say about you if your application or resume is messy or has misspellings and grammar errors? No employer expects you to be Shakespeare, but you should know how to spell the name of your high school, the last place you worked, and the last position you held. Believe it or not, these are common mistakes that people make!

Broadcast and direct participants to the Using Math, Reading, Writing, and Problem Solving Skills in the Workplace web page of the course and to the first activity, Identifying Writing Errors. Open the PDF and tell participants that they may do the same to follow along.

These are real errors from real resumes, cover letters, and applications. Read through the examples and solicit participants’ responses to the errors. These minor mistakes show major flaws such as, you are careless, you rush, you make a lot of mistakes, or you don’t check your work for errors. An employer doesn’t want an employee with these characteristics. When you are applying for a job and after you are working, make sure that you or even better someone else is proofreading what you write. If you want to proofread your writing before you give it to someone else to review, there are a couple things to look for. Broadcast http://teachers.net/gazette/JUL03/images/proofreading.pdf. Direct participants to the link on the course website. Print a couple copies of this to take with you. Then, you can use it the next time you need to write.

As you look at this checklist, is there anything that is unfamiliar to you (i.e., usage, grammar)? If there are things that you need to improve, you can get help through the local adult education program. Share the local information with participants.

Another item that could demonstrate your math, reading, writing, and problem solving skills is a Career Readiness Credential®. Does anyone have one of these? Is anyone familiar with the Credential and the WorkKeys® assessment? If any participants have a Credential or have taken the assessment solicit their thoughts and opinions in the discussion.

You can obtain a Career Readiness Credential® at the CareerLink®. You get this credential when you take the WorkKeys® assessment. The WorkKeys® assessment was developed by ACT. It isn’t a test like the SAT or GED®. This test is meant to determine workplace skills, so it tests your math, reading, and writing skills, but it does it with the workplace in mind. On the SATs you might have seen questions asking about a section of a novel or poem. You wouldn’t get this type of question on the WorkKeys® assessment. Instead, the WorkKeys® would ask you questions about the instructions for using a new machine or something from the human resources manual.

Career Readiness Credentials® have certain levels including, Bronze, Silver, Gold, and Platinum. ACT examined more than 18,000 job titles and determined the level of skill needed to successfully perform each job. This is where the levels come into play. Some jobs require a Bronze level credential, while others may require a Platinum level.

Activity: Let’s take a look at some profiles. Instruct participants to click on http://profiles.keytrain.com/profile_search/. The Facilitator should also broadcast http://profiles.keytrain.com/profile_search/. Ask participants for different job titles and search the skill levels required. Each participant should determine the Career Readiness Credential® level required for his or her career goal.

Now that you know where you need to be, let’s evaluate where you are. Go to http://www.act.org/workkeys/assess/sample.html. The Facilitator should broadcast this website as well. The most common WorkKeys® tests are Applied Mathematics, Reading for Information, and Locating Information. On this website, there are questions for each of these tests at each of the five levels (3 – 7).

Activity: Ask participants to locate the Answer Sheet on the participant website. Try each question for these three tests. Record your answers on the answer sheet by clicking on the appropriate circle. Try not to look at the correct answers.
Let’s just see where you might score if you took the WorkKeys® assessment today. Print a copy of your answer sheet when you are finished. Allow time to complete this activity.

**Debrief:** Review the correct answers. There is no need to review the proper way to solve the problems at this point. Ask the participants where they scored. Were you able to get all the 3s? 4s? 5s? Did anyone get all of them for levels 6 or 7? What test was the most difficult?

How many of you are currently actively looking for a job? Right now the job market is really difficult, especially for younger, less experienced workers. Have you faced challenges with getting a foot in the door for an interview?

As a younger, less experienced worker, you need to do everything you can to make yourself stand out from other applicants. One way that you can do this is to take the WorkKeys® assessment and obtain a Career Readiness Credential®. If your skills aren’t at place where you want them to be yet, you could go to the CareerLink® to use the WIN Courseware that is designed to help you prepare for the WorkKeys®. This is computer-based and you work independently. If you like being in a class or think that you could use some extra help, I can help you get connected with a local adult education program.

A Career Readiness Credential is something that can really make your resume stand out from the others and make you more attractive to employers. At this point, you can review any local employers who recognize or request a Career Readiness Credential. You can also distribute the CareerLink’s WorkKeys®/CRC® pamphlet and encourage participants to register for a WorkKeys® Orientation workshop.

**Course Closing –**

**Activity:** Ask students to open their saved version of the handout from the first day of class—*What Does Great Customer Service Mean to You?* Ask participants to type their answers to Part 2-Post-Customer Service Training Response. Tell participants to print one copy to certify completion and one to put in their portfolios.

**Debrief:** Ask for volunteers to share what they’ve learned throughout the course. How have your responses changed since the beginning of the course?

Remind students that no matter what your job is, you will come into contact with customers, external and internal. It is important to be positive and friendly and try to help all customers find solutions to fulfill their needs.

Ask students to complete a course evaluation. Collect the course evaluations.

Thank you for participating in this course! Encourage them to use the materials in their portfolios and remind them that they can continue to access the website and information after the course has ended.

Distribute course completion certificates, if applicable.
Developing Customer Service Skills – Course Evaluation

1. I learned some new things about the workplace in this course.

   Very True  True  Neutral  Sort of True  Not True

2. I learned things that I can use in my chosen career.

   Very True  True  Neutral  Sort of True  Not True

3. The course website was easy to use.

   Very True  True  Neutral  Sort of True  Not True

4. The activities and handouts were relevant to my goals.

   Very True  True  Neutral  Sort of True  Not True

5. What could we improve about the course?

6. What did you like about the course?