TRAINING MANUAL

Call Center Success

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CRISP. Learning
Menlo Park, California

A Crisp Group Training Program

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Call Center Success

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Based on the book

Call Center Success by Lloyd C. Finch

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INTRODUCTION

Welcome to *Call Center Success*, a Crisp Group Training Program for today's busy call center professionals. This guide will lead you through an eight-hour session that will help your learners:

- Gain a greater understanding of the call center job
- Learn the six factors of professionalism to more effectively perform the duties of the job
- Understand how the customer behaves and what the customer expects
- Achieve a new understanding of communicating with the customer and some techniques to be more effective
- Understand how to keep a positive attitude and how to continually improve their performance as a Customer Service Representative.

This manual will give you step-by-step instructions for a lively, interactive session. It includes structured lessons that combine readings and exercises from the Fifty-Minute™ book, *Call Center Success*, behavioral examples and reinforcement from the video, and group activities for personal application and skill practice. In the Training Materials package, you will find the masters for overhead **TRANSPARENCIES** or flip charts, **HANDOUTS** for group exercises, and an **ASSESSMENT** to be used before and after the class to measure the knowledge participants gain.

Also included in this package is a **CASE STUDIES VIDEO** and **DISCUSSION GUIDE**. Use these materials for reinforcement after this training session.

This course is designed with five modules, each accompanied by a video section. You may choose to deliver it over a series of days or weeks, selecting the module that is most appropriate for your CSRs at that time. Or you may present the entire class in a one-day session.

Learn additional tips and techniques for facilitating effective learning sessions from these Crisp Fifty-Minute™ books:

- *Delivering Effective Training Sessions*
- *50 One-Minute Tips for Trainers*
- *Graphics for Presenters*
- *Training Methods That Work*
- *Training Managers to Train*
- *Using Visual Aids*
- *Developing Instructional Design*

Whether you are a new trainer or a seasoned veteran, this guide is designed to help you deliver an effective learning experience. Estimated times may vary depending on the number of participants and their communication styles. Use your own background and stories to make the training personal and enjoyable for all involved.

CONTENTS

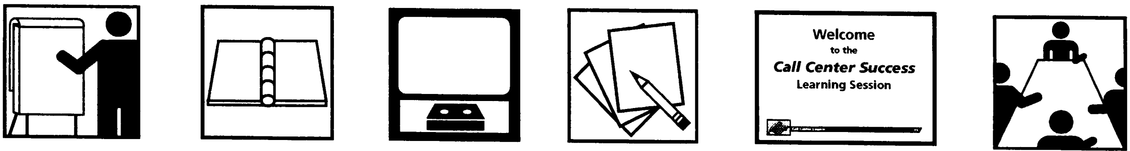
GETTING STARTED

About This Guide

This program was designed for a four-hour training session for a group of Customer Service Representatives. A group of up to 25 people is ideal but the material could be adapted easily for a larger group. This trainer's guide has questions and suggested activities to make this an interactive session. Strive to be a facilitator rather than a lecturer. The more the participants can discuss and practice the key concepts of this session, the better they will be at applying these skills when they return to their work.

Program Script

The program script is divided into two columns. The first column, **Format**, contains graphics to provide visual clues about the activities, visuals, and handouts. Below are the icons that depict the nature of the instructional material for each activity:



Flip Chart | **Book** | **Video** | **Handouts** | **Transparencies** | **Group Activity**

The second column, **Directions**, is a step-by-step guide to conducting this training using the video, activities, and content from the participant workbook. Experienced facilitators can either follow it exactly or use it as a prompt. The directions suggest a starting question to get discussions going expecting the trainer to automatically ask additional questions to keep it going.

Handouts/Participant Book

Master copies of handouts are provided. Be sure that you make enough copies to distribute to all participants at the appropriate time, as indicated in the guide. These handouts supplement the *Call Center Success* Fifty-Minute™ book, the participant guide for this session. Make sure you order a book for each participant.

Transparencies

Master copies of transparencies are contained in the Training Materials packet. If you prefer to use flip charts, the content can be transferred easily onto charts before the session.

Leading the Adult Learner

Successful program leaders must recognize that we learn differently as adults than we did as school children. Unlike children who may accept information at face-value, trusting the teacher to plan to lessons and impart knowledge, adults will judge for themselves what information is applicable and useful. If you use the following adult learning principles to develop training designs and facilitate group sessions, you'll increase the likelihood that participants will learn and apply new skills in their daily lives.

Adults...

- need to validate the information based on their beliefs and experiences
- expect that what they are learning is immediately useful
- have past experience upon which to draw
- have significant opportunities to serve as knowledgeable sources of information
- are problem-centered
- function best in a collaborative environment
- need to share in planning

Conducting Effective Discussions

Adults learn best in a collaborative environment. Your role as a trainer is to get the participants to talk, ask questions, and compare experiences. Encourage the participants to share challenges and solutions with each other and they will say this was a wonderful learning experience for them. Using paired sharing and role-play gets the participants involved.

This guide contains a number of brainstorming activities. When you begin your first brainstorming list, remember the basics:

1. Tell the participants, "When we are brainstorming 'anything goes.' Feel free to say what comes to mind, there are no right or wrong answers.

2. A good facilitator responds to their sharing with neutral verbal responses like, "okay," and, "others?" and "All right." Saying "Good idea!" to one idea and "okay" to another will shut down the free sharing of ideas.

3. Also, remember that the participants will only take as great a risk as you will take. Add your ideas to the sharing and always role model what you want them to do.

There are a number of reading opportunities for participants during this session. When facilitating these, encourage participants to be creative in playing different types of customers and CSRs. Many of these exercises begin by having you do the first reading. By modeling how you would like them to role-play during the reading, you can put participants at ease and make these exercises fun learning experiences.

PLANNING AHEAD

This checklist will help you get prepared for your training session.

At least 2 weeks prior:

- ❑ Watch the video to understand the flow of the class and the key points that will be presented.
- ❑ Read *Call Center Success* by Lloyd C. Finch.
- ❑ Obtain copies of the book, *Call Center Success*, for each participant.

At least 1 week prior:

- ❑ Create your visual aids. You may copy the Transparency Masters onto transparency film or create your own flip charts. Use ideas from the Crisp book, *Graphics for Presenters*, to make your charts interesting.
- ❑ Make copies of any handouts for each participant. If you will be using the Assessment for both pre and post-assessment, make copies on colored paper–one color for the pre-assessment and another color for the post-assessment.

At least 1 hour prior:

- ❑ Check room facilities and test all audio/visual equipment.
- ❑ Distribute participant books.
- ❑ Arrange flip chart pages.

30 minutes prior:

- ❑ Verify that all supplies are on-hand.
- ❑ Arrange name tags, supplies, and refreshments (if appropriate).
- ❑ Be on-hand to greet participants as they arrive. This provides an opportunity to learn a little about each person before the session begins, and participants may have concerns regarding the schedule, message system, or other logistics.

MATERIAL CHECKLIST

Audio/Visual Equipment

- ❑ Overhead projector
- ❑ Overhead transparencies
- ❑ Blank overhead transparencies and transparency pens
- ❑ Flip chart pad on easel
- ❑ Prepared flip charts
- ❑ Blackboard or white board with appropriate markers and eraser (optional)
- ❑ Call Center Success video
- ❑ Monitor and VCR player
- ❑ 4 easels, flip chart paper, and markers for small group activities
- ❑ Other:

Other Instructor Materials

- ❑ List of class participants
- ❑ Training Manual and instructional notes
- ❑ Masking tape for posting flip chart pages on the wall

MATERIAL CHECKLIST (CONTINUED)

Participant Supplies

- ❑ Name tent cards (in lieu of name tags) for each participant. Cards should be made of heavy paper stock with names printed in large letters. Omit titles, but department affiliation is sometimes useful. If names are pre-printed, arrange them alphabetically so participants can pick them up as they enter the room. If blank, put one at each place along with a marker.
- ❑ Pens or pencils
- ❑ Blank paper for each participant
- ❑ One copy of the book *Call Center Success* for each participant
- ❑ Copies of the Handouts for each participant
- ❑ 2 copies of the Assessment for each participant (one of each color)
- ❑ Other:

Room Requirements

- ❑ Break-out rooms for small discussions (optional)

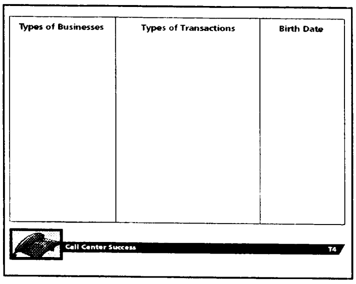
Instructor's Script

INTRODUCTION

Estimated Time: *30 minutes*

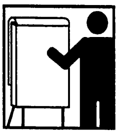
Recommended Flip Charts *(convert from transparencies)*

T-1



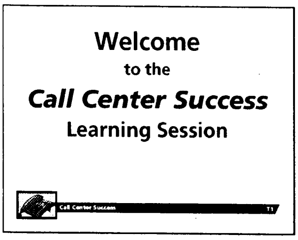
T-4

Format	Directions



PREPARE a flip chart with "Welcome to the Call Center Success Learning session" and place it where participants can see it as they enter the room.

or

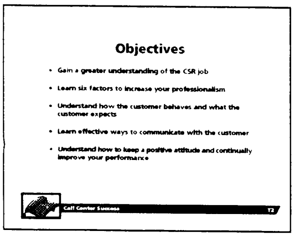


T-1

DISPLAY T-1.

WELCOME the participants to this learning session and introduce yourself. Tell them briefly about your background and how you came to be involved with this training.

EXPLAIN the ground rules for this learning session including the breaks, refreshments, policy regarding pagers and/or cell phones, interruptions, and the time you will be finishing.



T-2

DISPLAY T-2.

REVIEW the objectives for this course.

SAY: *"This is also the agenda we will follow, concentrating on one objective during each module."*

SAY: *"The participant workbook is yours so feel free to write in it as we go through this training session. I will be referring to the workbook and we will be doing activities along the way. After the class, it will serve as a resource to help you remember what we've learned today."*

SAY: *"The best place to start any discussion of call centers and Customer Service Representatives is to discuss the call centers and Customer Service Representatives that you come in contact with as a customer."*

Format	Directions

Ask: *"How many times a month do you come in contact with a call center while conducting your everyday life? Keep in mind that when you order from a catalog, inquire about a bill, request technical support, or get a call from a telemarketer, you are probably dealing with a call center."*

Determine an average number and multiply it by the number of participants in the room.

Say: *"As a group we total ___ number of times we come in contact with a Customer Service Representative monthly. We can expect that number to increase dramatically as more and more business is done via the Internet, catalogs, and virtual offices."*

Ask: *"Why do you think we use the telephone or email to conduct our business?"*

Possible Answers:

- Speed, it is faster
- Convenience
- Save gas
- Save money

Ask: *"How will this affect the job of a CSR in the future?"*

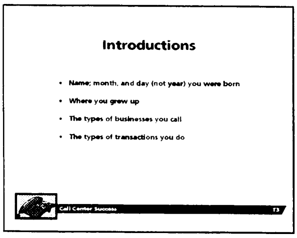
Possible Answers:

- Make it more essential
- Demand a higher level of knowledge
- Make it more interesting
- Require better writing skills

FORMAT	DIRECTIONS

TRANSITION to participant introductions.

SAY: *"Now before we learn more about the job of a CSR, let's learn a little about you."*



T-3

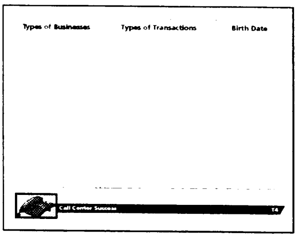
DISPLAY T-3.

SAY: *"To introduce ourselves we will share the following:*

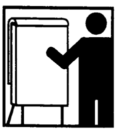
- *Name*
- *Month and day (not year) you were born*
- *Where you grew up*
- *The types of businesses you call*
- *The types of transactions you do*

I will share first."

SHARE your own experiences as you set the tone for the others.



T-4



DISPLAY T-4 or use a flip chart.

LIST the types of businesses down one column of a flip chart and types of transactions down the next column. On the right hand side of the flip chart list the birthdays. For example:

Business	Transactions	Birth Date
Bank	Payment	4/27

FORMAT	DIRECTIONS

POST the results for future reference.

NOTE: *You are recording participants' birth dates to use later as a criteria for selecting "volunteers" for activities.*

SAY: *"We'll be using these dates later, so I will keep them up on the wall."*

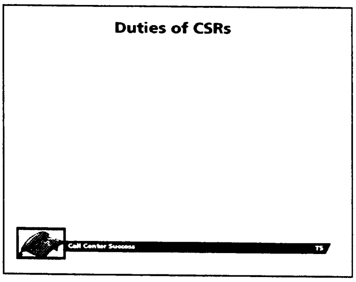
TRANSITION: "Now let's look at a video introduction to what it takes to be successful in today's active call centers."

MODULE 1

THE CSR, A POWERFUL VOICE

Estimated Time: *20 minutes*

Recommended Flip Charts *(convert from transparencies)*



T-5

Video Section 1: *5 minutes*

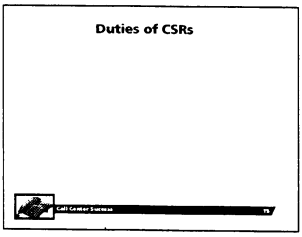
FORMAT	DIRECTIONS

SHOW the first segment of the video. (Approximate viewing time 5 minutes.)

STOP the video when you see End of Section 1.

SAY: *"As you can see the call center job is the job of the millennium. Customer Service Representatives are at all levels of expertise and in many different kinds of industries. We can expect to see more and more of these positions using either the telephone or email, or a combination, become available in the near future. Having this work experience will be a resumé-builder as you go through your career.*

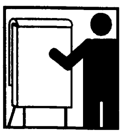
Let's get to the specific jobs you do."



T-5

DISPLAY T-5 or the flip chart.

ASK: *"What are the specific duties you do (or will be doing) as Customer Service Representatives?"*

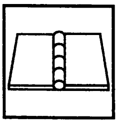


LIST answers on a flip chart or transparency titled "DUTIES OF CSRs."

Possible Answers:

- Solving problems
- Answering questions
- Suggesting plans of action
- Gathering information
- Taking orders
- Taking payments
- Making reservations (travel, classes, lodging, etc.)
- Entering information into the computer

FORMAT **DIRECTIONS**



Page 3

SAY: *"Turn to page 3 in the workbook."*

READ page 3, summarizing the CSR's valuable role.

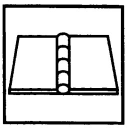
SAY: *"In the typical call center, a CSR gets only one chance to satisfy the customer. When the customer makes a specific request, the CSR must satisfy it or arrange a follow-up call. This same customer may call several times with other inquiries, but it's rare that the same rep will talk to that customer again.*

In other customer service situations, a CSR may have frequent contact with the same customer.

Many call centers document each customer call. This practice allows the next CSR who talks with the customer to know what transpired on previous calls. When documenting this type of information, brevity and accuracy are key. If the details of a customer problem aren't entered accurately, the next CSR who speaks with that customer may be caught short of important background information. Incomplete or inaccurate information diminishes customer satisfaction and undermines the company's credibility."

SAY: *"The call center is a demanding place to work. Within the confines of a short call, a rep must manage the conversation, satisfy the needs of the customer, control the length of the call, and upon completion, be prepared to immediately take the next call and repeat the process. Plus, the rep doesn't know who is calling next and what the need will be.*

Mix together the management of a high volume of customer calls and the need to be current on new product, service, and policy information and you have the recipe for a very challenging job."

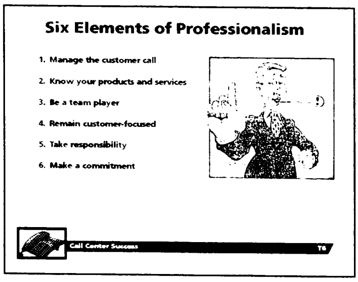
FORMAT	DIRECTIONS
 **Page 6**	**REVIEW** page 6 with the participants. **TRANSITION** to viewing the next segment of the video. **SAY:** *"Now let's look at the next segment of the video to learn how to gain the professional edge that will ensure the calls you handle will all be high quality."*

MODULE 2

GAINING THE PROFESSIONAL EDGE

Estimated Time: *75 minutes*

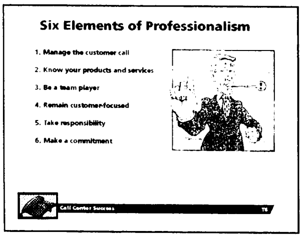
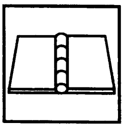
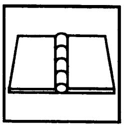
Recommended Flip Charts *(convert from transparencies)*



T-6

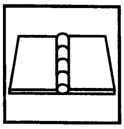
Use the transparency as you review each element, but post the flip chart on the wall to reinforce the learning.

Video Section 2: *14 minutes*

FORMAT	DIRECTIONS
	**SHOW** the second segment of the video. (Approximate viewing time 14 minutes.) **STOP** the video when you see End of Section 2.
 T-6	**DISPLAY T-6.** **REVIEW** the six elements of professionalism, revealing each one on the overhead transparency as you discuss it. **SAY:** *"Let's review the key elements from the video. There are six elements of professionalism that are 'musts' if you are going to handle the volume and keep a high quality of calls."*
 Page 10	**REVIEW** page 10 with participants. **SAY:** *"Today each of you will have an opportunity to be a volunteer during this training, in order according to your birth date. The person with the first birth date in the year (read from original flip chart) is our first volunteer."*
 Pages 11-13	**ASK** the first volunteer to read Customer 1 on page 11. **ASK** the participants to circle the letter of the customer needs that apply. **REVIEW** the solution to Customer 1 on page 12. **ASK** the next volunteer to read Customer 2 and have participants circle the best answer(s). **REVIEW** the solution to Customer 2 on page 12. **READ** the first and second paragraphs on page 13.

FORMAT	DIRECTIONS

ASK: *"What are our resources in this company to keep us updated?"*



Pages 14–15

ASK participants to rate themselves on page 14.

READ the box at the bottom of page 14.

READ the first paragraph on page 15.

ASK the next birth date volunteer to read 'the non-team player' on page 15.

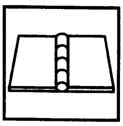
ASK: *"Do you think Susan got the job as a supervisor? Why or why not?"*

Possible Answers:

- No, probably not.
- By not being a team player, Susan had not practiced her leadership abilities and had no track record for promotion.
- If she was promoted, she probably would not have much support from the other reps.

SUMMARIZE by reviewing the bottom of page 15.

SAY: *"Every change in your customer service structure, policies, products, or services impact the customer. Successful reps consider how the customer will be affected."*



Page 16

ASK the next volunteer to read about Karen, Mike, and Zach on page 16.

ASK: *"Why is it important for you to represent the customer?"*

FORMAT	DIRECTIONS

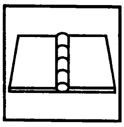
Possible Answer:

- CSRs are the closest to the customers, they understand their needs and concerns better than anyone.

ASK: *"What about balancing the needs of the customer with the needs of your organization? What does that mean? Why is it important?"*

Possible Answer:

- CSRs need to honor the policies and procedures of their organizations to help their organizations remain successful.



Page 17

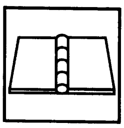
ASK the next volunteer to read the Jenny scenario on page 17.

ASK the group to individually check those that apply on page 17.

DISCUSS their answers and their own experiences, referring to the box at the bottom of the page as a guide for this scenario.

ASK: *"Who is responsible for your behavior and performance at work?"*

Answer: We are all responsible for our own behavior and performance.



Page 18

ASK participants to see if they agree with the list of responsibilities on page 18.

ASK: *"What are some of the things you do to keep yourself positive?*

FORMAT	DIRECTIONS

Possible Answers:

- Be well rested
- Drink water
- Exercise
- Look for positives

ASK: *"How do you promote teamwork?"*

Possible Answers:

- Help co-workers
- Share successes

ASK: *"How do you demonstrate using good judgment?"*

Possible Answers:

- Ask for help
- Listen to others

Pages 20-22

ASK the next birth date volunteer to read "You Make the Decision" on page 20.

READ page 21, summarizing why it is important to make a commitment and how this will benefit the CSR now and in the future.

ASK participants to rate their level of commitment on page 22, then rate their co-workers as a whole, and finally guess how their co-workers would rate them.

FORMAT	DIRECTIONS
	SAY: *"If you rated yourself higher than you rated your co-workers, you did what the majority of people do. If you'd like to know how they would rate you, ask them to fill out this same checklist."*
	SUMMARIZE the six elements of professionalism.
	TRANSITION to showing the video.
	SAY: *"Now let's look at the most important element for success in a call center—that all-important customer. In this segment of the video, you will learn how to better understand customers and the eight things they want. Be sure to take notes on their key needs."*

MODULE 3

THE ALL-IMPORTANT CUSTOMER

Estimated Time: *75 minutes*

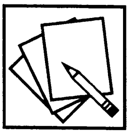
Video Section 3: *10 minutes*

FORMAT	DIRECTIONS

SHOW the third segment of the video. (Approximate viewing time 10 minutes.)

STOP the video when you see End of Section 3.

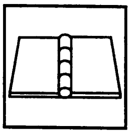
SAY: *"Everyone is unique and no two customers will behave exactly the same way. Most people will exhibit a blend of behavioral styles depending on the situation. But as you saw in the video, most people tend toward one behavioral style a majority of the time. Let's see if you can determine your dominant style."*



H-1

DISTRIBUTE H-1 and instruct participants to answer the questions.

SAY: *"If you answered 'yes' to all or most of these you tend to be an Assertive Customer. If you had more 'no' answers, you are an Analytical Customer. Let's look at the characteristics of an analytical customer."*



Pages 26–28

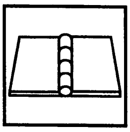
REVIEW the characteristics of the Analytical Customer on page 26.

ASK: *"Who can identify with this style?"*

ASK: *"For the rest of you, can you identify with the characteristics on page 27?"*

SAY: *"Each of these customer types expects a response from a CSR that matches their unique style. To better understand how to respond to these analytical and assertive behaviors, let's look at some real situations on page 28. I will read the situation and then the next birth date volunteer will read the response. One volunteer will be the Assertive Customer, the other, the Analytical."*

FORMAT	DIRECTIONS



Pages 28–30

READ Situation 1 on page 28.

ASK the next two birth date" volunteers to read responses. One volunteer is the Analytical Customer in both examples; the second volunteer is the assertive customer in both examples.

SAY: *"The key is to tailor your responses to accommodate your customers."*

REVIEW the guidelines for Assertive and Analytical Customers on page 29.

ASK the participants complete the exercise on pages 30 and discuss their answers.

NOTE: *Recommended answers appear on page 38.*

ASK: *"If you have an assertive style, what are some of the things you can do to tailor your responses for an Analytical Customer?"*

Possible answers:

- Slow down a little during conversations
- Give the customer time to think
- Force yourself to listen closely
- Let the customer talk

ASK: *"What if you are analytical? How can you adapt to Assertive Customers?"*

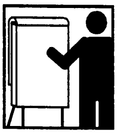
Possible answers:

- Pick up your pace during conversations
- Realize that many customers don't need all the details

FORMAT	DIRECTIONS

TRANSITION to the next exercise by saying, "We are going to look at what else customers need in addition to hearing responses that match their own communication styles,. And since we are all customers, let's start by making a list of what we want."

ASK: *"What are the characteristics of customer service that you like in the people you do business with?"*



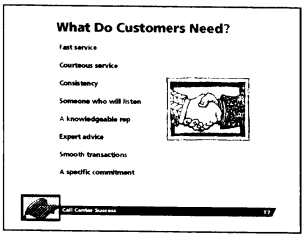
Write answers on a flip chart.

Possible Answers:

- Efficient
- Service
- Friendly
- Knowledgeable
- Respectful
- Listen to me
- Consistent
- Give me advice
- Problem solver
- Caring attitude
- Enthusiasm
- Empathetic
- Accurate
- Professional
- Committed
- Courteous

FORMAT	DIRECTIONS

SAY: *"Lloyd Finch, the author of this book and a noted call center expert, has combined these needs under eight categories.*



T-7

DISPLAY T-7.

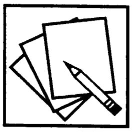
NOTE: *As you discuss the eight things customers need described in the book and video, refer to the participants' flip chart list, linking their needs with the matching categories from the book. Reveal each point on the transparency as you discuss it.*

1. Fast service

SAY: *"Remember that customers may have been waiting on hold before they get to you. When greeting someone who has been on hold either apologize for them holding, 'I'm sorry you had to wait so long,' or say, 'Thank you for holding.'"*

2. Courteous service

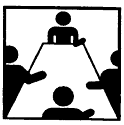
SAY: *"Let's define what courteous service means in your call center."*



H-2

DISTRIBUTE H-2. Give participants a few minutes to read the instructions and write an acceptable greeting for their own call center.

DIVIDE the group into pairs. Have them take turns practicing their greeting.



Group Activity

ASK them to practice putting people on hold.

FORMAT	DIRECTIONS

3. Consistent service

SAY: *"Customers want consistency in their interactions with a company. They expect all CSRs to respond to them in a positive and consistent way.*

ASK: *"How do you maintain consistency in your call center?"*

Possible Answers:

- Document all calls
- Follow standard policies
- Have standard greetings

4. Someone who will listen

SAY: *"They do not want to repeat themselves."*

ASK: *"How do you let customers know that you are listening and that you heard them?"*

Possible answers/emphasize the following:

- Supportive listening phrases like "I understand," "I see," and, "Okay."
- Paraphrase–repeat what the customer has said
- Ask questions

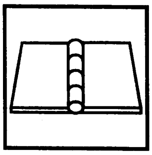
5. A knowledgeable rep

SAY: *"Customers expect excellent product and service knowledge. They don't want call backs or other delays."*

FORMAT	DIRECTIONS

6. Expert advice

SAY: *"They want our expert advice in their transaction."*



Page 35

ASK the next birth date volunteer to read the Michelle scenario on page 35.

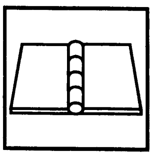
SAY: *"Don't knowingly let the customer make a bad decision. Providing the customer with the best service is always the best choice."*

7. Smooth transactions

SAY: *"That means making it easy for the customer to do business with you. Take the extra effort to explain new policies or complex information to customers."*

8. A specific commitment

SAY: *"Let's listen to some statements that tell the customer we are making a commitment to satisfy their needs."*



Page 37

ASK the next birth date volunteer to read the three statements on page 37.

TRANSITION to the next topic.

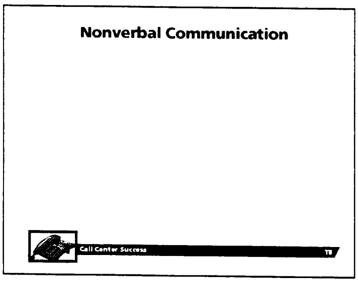
SAY: *"Now that we have looked at what customers need, we are going to spend some time building our skills to meet those needs."*

MODULE 4

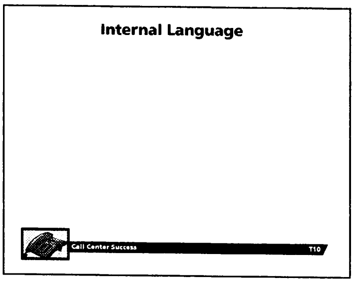
BUILDING YOUR SKILLS

Estimated Time: *3 hours*

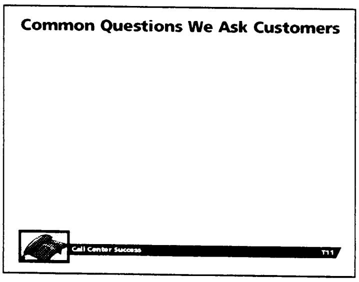
Recommended Flip Charts *(convert from transparencies)*



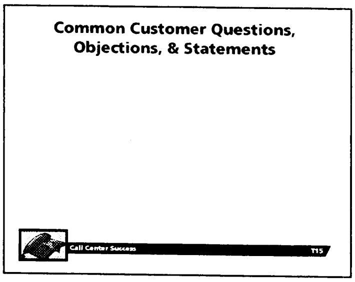
T-8



T-10



T-11



T-15

***NOTE**: You may shorten this section by selceting specific skills for review. You may also deliver this content in daily 15–20 minute segments, each focused on a different skill.*

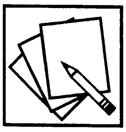
Video Section 4: *24 minutes*

FORMAT	DIRECTIONS

SHOW the fourth segment of the video. (Approximate viewing time 24 minutes.)

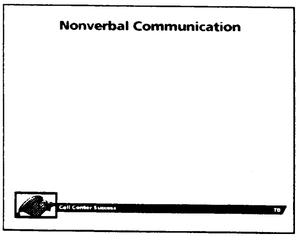
STOP the video when you see End of Section 4.

SAY: *"Now we want to get specific in how to do this job of Customer Service Representative the most effective way it can be done. We have reviewed how customers behave and what they want. Now we are ready to reinforce the skills you are doing well and assist you in improving other skills. Before we begin in the workbook, let's discuss some communication basics."*



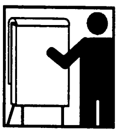
H-3

DISTRIBUTE H-3. Give the participants time to record examples of nonverbal communication.



T-8

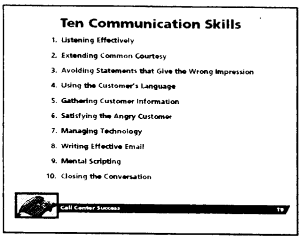
LIST the group's nonverbal communication methods on a flip chart or **T-8**.



READ the tips at the bottom of the handout, demonstrating the techniques as you read.

NOTE: *This handout is designed to emphasize the importance of nonverbal communication and help participants understand that they must try to compensate for that loss when communicating over the telephone.*

FORMAT	DIRECTIONS

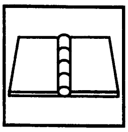


T-9

DISPLAY T-9, revealing each skill as you discuss it.

SAY: *"We will focus on these ten areas for development of communication skills."*

1. Listening Effectively



Page 42

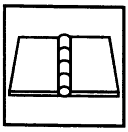
ASK the next birth date volunteer to read the Petra & Eric story on page 42.

ASK the participants to rate their own listening ability on the scale at the bottom of the page.

SAY: *"Most of us have room for improvement when it comes to listening. Here are a few ideas:*

- *Hear the reason for the customer's call*
- *Focus on what the customer has to say*
- *Listen for what the customer is interested in."*

ASK: *"Can you think of a co-worker who is a good communicator? Chances are he or she is also a good listener."*

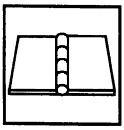


Page 46

ASK participants to check their obstacles to listening on the Obstacle Exercise on page 46. Discuss their answers.

SAY: *"Being aware of obstacles that negatively impact your listening can help you eliminate these roadblocks or substantially reduce their impact."*

FORMAT	DIRECTIONS

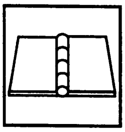


Pages 50–53

2. Extending Common Courtesy

REVIEW the key phrases on page 50 and highlight the correct way to use a customer's name on page 51.

ASK participants to do the exercise on page 52, covering up the facing page until they have finished their own answers. Discuss their answers using page 53 as an example.



Pages 54–58

ASK the next birth date volunteer to be the Rep in Example 1 on pages 54–55. Have the trainer be the customer and narrator. Then have the same volunteer be the Rep in Example 2 pages 56–57.

ASK: *"Which conversation do you think leaves a more positive impression? What's the difference?"*

Possible Answer:

- One is cold and matter-of-fact while the other includes civility

SAY: *"We have opportunities to use common courtesy often. Here we will discuss four of them. First opportunity is the customer has made an error."*

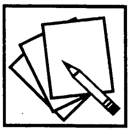
READ the paragraph on page 58 under Opportunity 1 up to "you might say." Then have participants divide into pairs and alternate reading the quotes under Opportunity 1.

READ Opportunity 2, 3 and 4, continuing to have participants practice in pairs.

FORMAT	DIRECTIONS

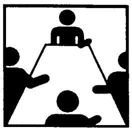
SAY: *"Now let's switch pairs for this next exercise, Avoiding Statements That Give the Wrong Impression."*

3. Avoiding Statements That Give the Wrong Impression



H-4

DISTRIBUTE H-4. Have the participants work in pairs to decide what is wrong with the response and arrive at a better one.

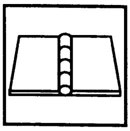


Group Activity

SAY: *"Let's go through each of the examples and discuss the problem and a better solution."*

For each situation, **ASK:** *"What is wrong with the example CSRs response? What will the customer believe about the company based on the CSR's response?"* (Write notes on your copy of the handout as you discuss the examples.)

ASK participants to share their better responses.



Pages 61–62

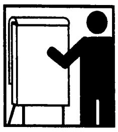
REVIEW the information on pages 61–62, asking participants why they think it is important to

- Keep negative organization information to themselves
- Not be critical of other work units
- Keep their statements positive

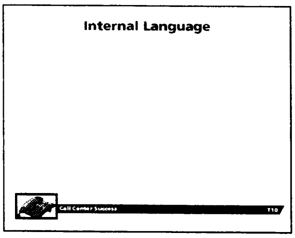
FORMAT	DIRECTIONS

4. Using the Customer's Language

SAY: *Every organization has an internal language, loaded with acronyms, buzz words, technical language, and slang.*



ASK: *"What are some of the words we use in our company that may not be familiar to an outsider?"*



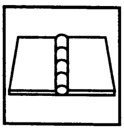
T-10

LIST responses on a flip chart or **T-10.**

SAY: *"These are terms that need to be avoided. Clearly communicating and not confusing the customer is our goal."*

5. Gathering Customer Information

SAY: *"You must get information from customers in all interactions. Effectively probing can create a positive experience for the customer as well as a positive experience for the Customer Service Representative."*



Pages 66–68

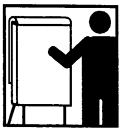
ASK participants to silently read page 66 about open and closed questions. Have the participants test their knowledge on page 67.

DISCUSS their answers, asking for a few examples of their questions on items 3 and 4.

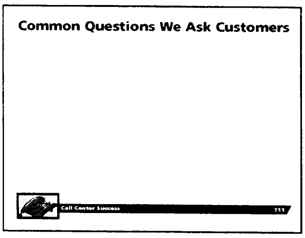
SAY: *"When asking several questions in a row, it is important not to sound as if you are interrogating the customer. Let's look at some words on page 68 that help to soften those questions."*

REVIEW some of the statements on page 68.

FORMAT	DIRECTIONS



SAY: *"Using the word 'and' is the recommended professional way to transition from one basic question to another."*

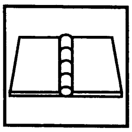


T-11

ASK: *"What are some of the common questions you ask customers?"*

LIST on a flip chart or **T-11.**

ASK participants to do the exercise on page 70. Ask them to share their responses.



Page 70

6. Satisfying the Angry Customer

SAY: *"A great deal has been written about how to calm an angry customer. There are many techniques and always the advice 'don't take it personally!' At times that is difficult advice to take. Most of us have our feelings hurt by angry customers, whether we like to admit it or not. Here are three steps you can take to decrease those hurt feelings:*

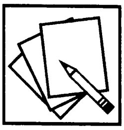
1. Tell yourself the angry customer is upset with your organization, not with you.

2. When your feelings are hurt, respond logically, not emotionally.

3. Force yourself to remain positive in your comments during the conversation with the upset customer."

SAY: *"Here is a technique that is very effective in managing an angry customer. It is called Anger Mountain."*

FORMAT	DIRECTIONS

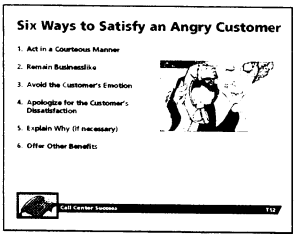


H-5

DISTRIBUTE H-5.

REVIEW the steps to the top of Anger Mountain.

SAY: *"There are six actions that a Customer Service Representative can use to manage through the anger mountain technique."*



T-12

DISPLAY T-12. Reveal each technique as you discuss it.

1. Act in a Courteous Manner

SAY: *"Being courteous and civil can assist in diffusing a customer's anger."*

2. Remain Business-like

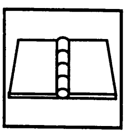
SAY: *"Remind yourself that you are a business person. If you become emotionally involved, it is difficult to stay focused on business. As long as you remain businesslike you have a much better chance to turn the angry customer around."*

3. Avoid the Customer's Emotion

SAY: *"Staying calm and professional is your best behavior in this situation."*

4. Apologize for the Customer's Dissatisfaction

SAY: *"You can apologize in a general way or specifically for something that was done or not done."*



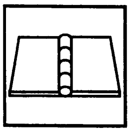
Page 75

ASK the next birth date volunteer to read through the examples of general and specific apologies on page 75.

FORMAT	DIRECTIONS

5. Explain Why (if necessary)

SAY: *"When customers demand an explanation, be careful with your answer. You should not share internal information that produces a negative image of you and the organization. Let's look at some good examples on page 76."*



Page 76

READ the examples on page 76.

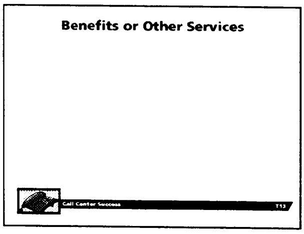
ASK: "Do you have other good examples that you use to avoid sharing internal problems with the customer?"

6. Offer Other Benefits

SAY: *"What are some of the benefits or other services we can offer in this company?"*

Possible answers:

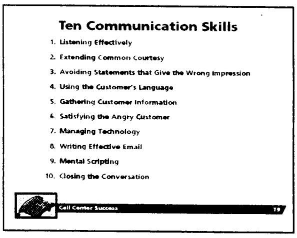
- $ off next purchase
- More time to pay
- Reduce or eliminate a late fee
- Offer a new plan or program
- Send new catalog
- Remind of past satisfaction
- Offer to call next time there is a special
- Thank them for their business
- Apologize that you cannot meet their request



T-13

DISPLAY T-13 and point out benefits that add to the participants' lists.

FORMAT	DIRECTIONS



T-9

DISPLAY T-9

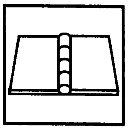
7. Managing Technology

SAY: *"The next important communication skill is managing technology. Managing the telephone, voicemail, fax, and conference calls are important customer communication skills."*

ASK: *"Why do you think the skills for managing technology get more important every day?"*

Possible Answer:

- Call centers and customers increasing depend on technology to do their business.



Pages 79–82

ASK participants to rate their knowledge of telephone features on page 79.

ASK: *"If you have anything under a 5 rating, now is the time to practice, not when you have a customer on the phone."*

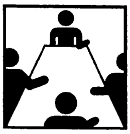
ASK: *"Voicemail is another critical technology. Check your voicemail frequently and act on any messages that need action. Let's look at some tips for leaving messages."*

READ "Tips for leaving messages" on page 81.

ASK: *"What about receiving messages? Can you add anything to the list on page 81?"*

REVIEW the eight factors to include in your voice mail message on page 82.

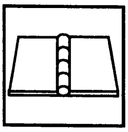
Format	Directions



Group Activity

DIVIDE the group into pairs. Have the pairs rate the three examples of voicemail messages on page 83 as either good, excellent, or poor.

DISCUSS answers and reasons, page 84.



Pages 84–88

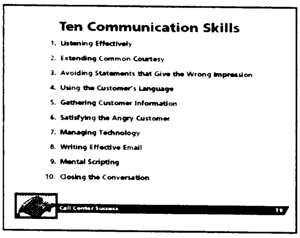
SAY: *"When writing fax messages, use business language, keep it brief and to the point, and use the common courtesy of a business letter format."*

ASK the next birth date volunteer to read the two scenarios on page 85.

ASK: *"What is wrong with this communication?" after each scenario.*

REVIEW "Using a Cover Sheet" on page 86.

> *OPTIONAL* (only discuss if it is a part of their job)
> **REVIEW** the section on conference calls, page 87.
> **ASK** the next birth date volunteer to read the Marcy scenario on page 88.



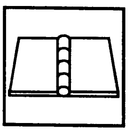
T-9

DISPLAY T-9.

8. Writing Effective Email

SAY: *"Many of us have become very casual in our personal email."*

REVIEW Email Etiquette on page 89.



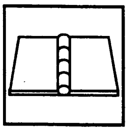
Pages 89–90

ASK participants to complete the assessment on page 90.

DISCUSS their answers.

FORMAT	DIRECTIONS

SAY: *"When attaching documents or other files, be sure to review them through the eyes of your customer; make sure the content and wording are appropriate and present a positive impression for your organization. Let's see what happens when John skips this step."*

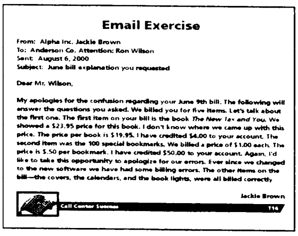


Pages 91–93

ASK the next birth date volunteer to read the example on page 91, "John's customer..."

ASK the participants to rewrite the email in Example 1 on page 92.

In Exercise 2 on page 93 have the participants cross out unnecessary sentences. Have them share what they marked out.



Email Exercise

From: Alpha Inc. Jackie Brown
To: Anderson Co. Attention: Ron Wilson
Sent: August 6, 2000
Subject: June bill explanation you requested

Dear Mr. Wilson,

My apologies for the confusion regarding your June 9th bill. The following will answer the questions you asked. We billed you for five items. Let's talk about the first one. The first item on your bill is the book *The New Tax and You*. We showed a $23.95 price for this book. I don't know where we came up with this price. The price per book is $19.95. I have credited $4.00 to your account. The second item was the 100 special bookmarks. We billed a price of $1.00 each. The price is $.50 per bookmark. I have credited $50.00 to your account. Again, I'd like to take this opportunity to apologize for our errors. Ever since we changed to the new software we have had some billing errors. The other items on the bill—the covers, the calendars, and the book lights, were all billed correctly

Jackie Brown

Call Center Success T14

T-14

DISPLAY T-14.

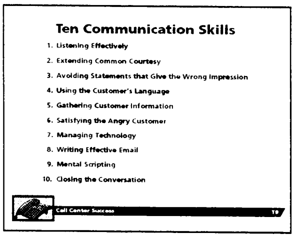
MARK their deletions on **T-14** as they share. Read after marking out the sentences. (Page 94 has the details of what to mark out.)

ASK: *"Is there anything else we could do for this customer?"*

Possible answers:

- Offer a discount on next order
- Send a small gift

FORMAT	DIRECTIONS



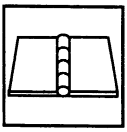
T-9

DISPLAY T-9.

9. Mental Scripting

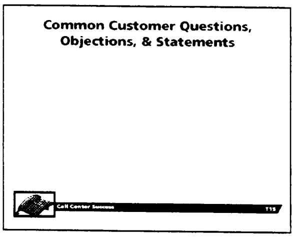
SAY: *"Mental scripting is the process of preparing, practicing, and memorizing a complete response based on a particular statement, question, or objection from the customer. It isn't intended to take away a CSR's individuality. The goal is to get all the needed information out in an organized manner.*

Think for a moment about your co-workers. Is there one who stands out for his or her ability to talk and always seem to have the right response at the right time? Perhaps this person mentally scripts standard responses. To say the right thing at the right time and provide the best possible descriptions and explanation just takes a little preparation."



Page 96

REVIEW some of the examples of mental scripting on page 96.

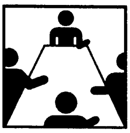


T-15

ASK: *"What are some of the common customer questions, objections, and statements that you encounter?"*

LIST participant responses on a flip chart or **T-15.**

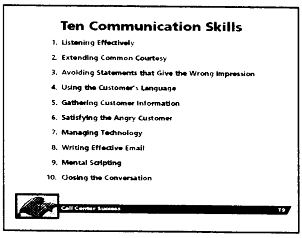
FORMAT	DIRECTIONS



Group Activity

DIVIDE the participants into groups of three. Give each group two or three of the items from the list and have them work on a mental script that will be an effective response.

ASK one person from each group to share their group's mental scripts. Gather the activity notes and compile the results for a handout at a later meeting or to be distributed through inter-office mail in a week or so as a reminder of the training.



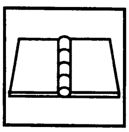
T-9

DISPLAY T-9.

10. Closing the Conversation

SAY: *"The final key communication skill is closing the conversation. As you finish your telephone conversation, there are some appropriate and courteous statements that should always be made. You should:*

- *Thank the customer for calling.*
- *Let the customer know you appreciate his or her business.*
- *Provide assurance that any promises will be fulfilled.*
- *Leave the customer with a positive feeling."*



Page 98

ASK each of the participants to read one of the closing examples on page 98 until all have been read.

TRANSITION to the final section by saying, "So far we've learned about the important job of a CSR, about our customers, and about key skills. Now we are going to explore the most important thing a CSR can have to ensure success, in this job and in life!"

MODULE 5

ATTITUDE– YOUR MOST IMPORTANT ASSET

Estimated Time: *60 minutes*

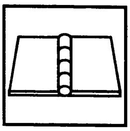
Video Section 5: *6 minutes*

FORMAT	DIRECTIONS

SHOW the final segment of the video. (Approximate viewing time 6 minutes.)

SAY: *"When you were hired, your attitude may not have been discussed, but it was definitely noted. Your attitude is always on display for co-workers, supervisors, and customers. When preparing for work you either include a positive attitude or you don't. When you bring a good attitude to work, it is welcomed by everyone.*

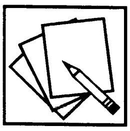
The most important thing to remember is that you can choose to change your attitude. While outside circumstances may influence your emotions and feelings, you choose whether you will react positively or negatively."



Pages 101–102

ASK the next birth date volunteer to read the scenario on page 101. Have participants answer the questions about what influences Raymond's attitude on page 102.

DISTRIBUTE H-6.



H-6

TELL the participants that as you go through this section they should write ideas that will help them, using the boxes on the handout. Go through the handout one item at a time.

SAY: *"1. Past experience. What are some of the negative experiences that affect your work today? Write down what affects you, then plan to shut off negative thoughts of past experiences and focus on the positive.*

FORMAT	DIRECTIONS

2. Self Talk. What can you do to keep your thoughts positive, during the work day?"

Possible answers:

- Go outside at break time
- Walk at lunch
- Read a poem
- Create a positive work space

"3. Improve your physical and mental well being. What can you do?"

Possible answers:

- Exercise regularly
- Stay rested

"4. Desire to be positive. This is the same as the self talk section. Write in this box 'Approach each call as if it were the first in the day and will be the best interaction of the day'.

5. Enthusiasm for work. How do you communicate enthusiasm on the telephone?"

Possible answers:

- Tone of voice
- Take a breath
- A smile
- Energy in your voice

Format	Directions

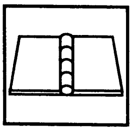
"6. Self awareness. Ask yourself 'How am I feeling about my customers today?'

7. Motivation to provide quality service. Who has had a compliment on their service? What was it and how did it feel?

8. Look at the future. What are some of the improvements you have made in your skills and abilities since you started working?

9. Selecting a positive attitude. It is a choice we make every day to be positive. In Raymond's case he had a bad start to the day but by simply choosing to change his mind he can change his attitude and the remainder of the day will be fine.

10. Stress. Let's talk about stress and how you can manage it."



Pages 106–109

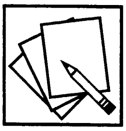
ASK the next birth date volunteer read the example of Morgan from the workbook, page 106.

ASK participants to identify the factors that induce stress in their own lives, checking the applicable boxes on page 107.

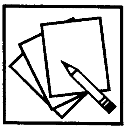
ASK the next birth date volunteer to read about Sean on page 108. Also have them read Sean's action plan, page 109.

SAY: *"Sean's action plan addresses a combination of personal and work-related factors. Think about the level of stress you feel. If it is low perhaps nothing needs to be done, but if you feel stressed—even for a portion of the day—review your stress contributors and design an action plan that will help manage your stress."*

FORMAT | **DIRECTIONS**



H-6



Pages 113–117

ASK participants to write their own plans to manage stress, using the box on the handout.

SAY: *"No training for Customer Service Representatives would be complete if each of you did not make plans to improve. Let's look at the three steps on page 113."*

REVIEW the three steps.

ASK participants to review the list of skills on page 114 and rate each skill from one to five. Next, have them review page 115 and define their objectives.

REVIEW the example of how an action plan would look, page 116.

ASK them to fill out their own action plan on page 117 based on those skills they rated as a three or lower in the skills inventory.

SUMMARIZE the course by reviewing these key points on flip charts and transparencies.

SAY: *"Customers want what we want—a positive interaction when doing business with every Customer Service Representative that they come in contact with. Today we have discussed how to get that done with:*

- *Understanding Your Role*
- *The Six Elements of Professionalism*
  1. *Managing the call*
  2. *Know your products & services*
  3. *Being a team player*
  4. *Remaining customer focused*

FORMAT	DIRECTIONS

5. *Take responsibility*
6. *Make a commitment*

- *The All-important Customer*
- *Building your Communication Skills by:*

1. *Listening effectively*
2. *Extending common courtesy*
3. *Avoiding statements*
4. *Using the customer's language*
5. *Gathering customer information*
6. *Satisfying the angry customer*
7. *Managing technology*
8. *Writing effective email*
9. *Mental scripting*
10. *Closing the conversation*

- *Attitude*

SAY: *"Putting into work all that we have discussed today will make you an exceptional Customer Service Representative and bring you a great deal of job satisfaction! You will truly experience Call Center Success!"*

OPTIONAL: Distribute the 25-question post-assessment and ask participants to check the appropriate answers.

If you have a standard class evaluation form, ask participants to fill it out now.