



# Customer Service

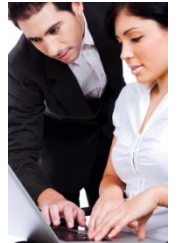
**Scroll Through the Following Slides  
to Learn More About Our  
Customer Service Materials**

[www.brainstormdynamics.com](http://www.brainstormdynamics.com)

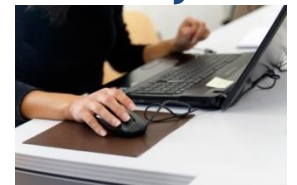
# Brief Overview



**Our Customer Service Content Can Change the Way You Create Some of Your Training and Learning Materials**



**Making it Simple and Easy to Customize and Publish Workbooks, Leader's Guides, eLearning Content, Handouts, and Other Learning Materials . . .**



**Saving Both Time and Money**



# The Participant's Workbook and Leader's Guide

Are Created in Microsoft WORD

## Overview

Customer Service is a program that provides you with the essential information and skills needed to excel in interactions with internal and external customers.

This program develops your customer service skills through recognizing and dealing with the customer's emotions, using your listening and questioning skills, and presenting information to satisfy customers. You will learn to create rapport with any customer or co-worker, and work toward positive outcomes.

Customer Service is designed for you to actively participate with your peers in the training workshop. This training program encourages you to improve your knowledge and skills by integrating your work-related situations into the workshop.

## Course Objectives

Our goal is to build greater personal skill and confidence in your ability to provide superior customer service by focusing on the areas listed below.

- Identifying Customer Service Excellence
- Doing a Customer Service Analysis
- Identifying "Blocks" to Excellent Customer Service
- Identifying Key Customer Service Skills
- Recognizing the Customer's Emotional Level
- Identifying Positive and Negative Listening Responses
- Using Questions to Gather Information
- Presenting Information to Satisfy Customers
- Developing Effective Language
- Dealing With Anger and Other Negative Emotions in Customers
- Determining Your Level of Empowerment with Customers
- Using Effective Telephone Skills

## Personal Objectives

In this section of your workbook, write our one or two personal objectives you would like to accomplish by the end of Customer Service. Use these objectives as your measuring tools to help you determine where to focus your energies during the workshop. Try to limit your main objective to about 10 to 15 words and maybe one or two bullets. As you get into the exercises and talk to other participants, you can modify your objectives.

## Customer Service Excellence

### Do You Believe?

Listed below are 10 very important beliefs to providing exceptional customer service. These core beliefs are your foundation so you continuously do what is best for the customer. In a small group of three people, talk out-loud and discuss the 10 beliefs. In the spaces below, add two of your own.

1. Customers are "valued" and important people, whether they're in person, on the phone, or by mail.
2. Customers deserve outstanding service. It is our responsibility to provide service in a manner that is mutually beneficial and with satisfactory results.
3. Customers are not interruptions to our jobs. They are the reasons for our jobs.
4. Customers must not feel dependent on us. On the contrary, we are dependent on them.
5. Customers are people like us, not numbers or statistics.
6. Customers are not people to argue, challenge, humiliate, or embarrass. They are to be treated with dignity and respect.
7. Customers have a right to receive prompt and courteous service, regardless of their own behaviors.
8. Customers are part of what we do, not people on the "outside."
9. Customers provide us with opportunities to service them. These opportunities are an outstanding way for each of us to distinguish our organization and ourselves.
10. Customers have the same expectations we do when we are in the role of the customer being serviced by someone else.

11. \_\_\_\_\_

12. \_\_\_\_\_

## Sample Two-Day Agenda

The times listed below are approximate and should be used only as a basic guideline. It's more important to allow the participants to spend time in the exercises that benefit them the most. You can easily modify these times. Try not to let the clock run your workshop. Observe the participants and make your time decisions accordingly.

Opening the Workshop	20 minutes	8:30 - 8:50
Customer Service Excellence	10 minutes	8:50 - 9:00
Customer Service Analysis	30 minutes	9:00 - 9:30
Customer Expectations	30 minutes	9:30 - 10:00
Break	15 minutes	10:00 - 10:15
Identifying Blocks to Customer Service	30 minutes	10:15 - 10:45
Key Customer Service Skills	30 minutes	10:45 - 11:15
Recognizing the Customer's Emotional Level	20 minutes	11:15 - 11:35
Listening Responses	15 minutes	11:35 - 11:50
Listening Responses Exercise	30 minutes	11:50 - 12:10
Lunch	60 minutes	12:10 - 1:10
Listening Acknowledgments	15 minutes	1:10 - 1:25
Listening Skills Exercise	20 minutes	1:25 - 1:45
Skill Practice	40 minutes	1:45 - 2:25
Effective Use of Questions	15 minutes	2:25 - 2:40
Break	15 minutes	2:40 - 2:55
Questioning Skills Exercise	30 minutes	2:55 - 3:25
Skill Practice	60 minutes	3:25 - 4:25

## Customer Service Analysis

- 1) State the following and direct participants to page 3.

On page 3 you see a series of questions that are designed to be a self-audit or self-evaluation. It's important for you to be honest with yourself so you can see where to apply the skills from this program.

To do this exercise properly, put yourself in the role of one of your customers. When you do this, you should be able to see yourself performing your job along with your peer. Really concentrate so you can hear the sounds around you, including the words that are being used. You need to be that specific when you do this exercise. Once you are in that frame of mind, answer the questions on an individual basis. You have about 10 to 15 minutes to complete page 3. Does anyone have any questions?

Answer any questions.

Walk around and assist as needed. When you notice most of the groups finishing the exercise, do a quick debriefing.

- 2) State the following to debrief the exercise.

Let's go around the room and see how you answered the questions.

Gain responses:

What areas can we improve?

Gain responses:

What are some things you do well in customer service?

Gain responses:

Any other comments or questions?

Answer any questions.

All right, let's move on to the next exercise.

- 3) State the following and direct participants to page 4.

This program is designed to assist you in improving your customer service skills. However, too often employees are not always in full agreement as to who their customers are. We want to be sure that we look at both our internal and external customers.



# Sample Workbook Pages

CUSTOMER SERVICE

## Overview

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## Short-Term Meetings

If you are going to facilitate this program in a series of short-term meetings instead of two-days, divide the program into the seven segments listed below. Each segment of the program will run from around 45 minutes to three hours.

Segment 1 - Leadership, and Management With Leadership

• Workbook pages 1 - 10

Segment 2 - Skills of an Effective Leader, and Blocks to Leadership

• Workbook pages 11 - 15

LEADERSHIP

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Coaches shouldn't allow the exercise to go longer than 2 minutes. There should be plenty to coach in that time frame. Once the exercise is stopped, the coach provides his or her insight using the Coaching Checklists on the following two pages. Once the person coaching is finished, the person practicing goes again and tries to incorporate the coaching he or she just received. Remember, the repetitions are critical. If you follow the rules, and the coaches provide their insights properly, the exercises will be worthwhile. Outlined below are some basic coaching guidelines and rules for the skill practice.

## Skill Practice Coaching

LEADERSHIP

## Skill Practice Coaching Checklist

- Does the Person Practicing:
- Continually Recognize the Prevailing Emotion?
  - Use Effective Listening Responses?
  - Prove Full Attention?
  - Clarify and Confirm?
  - Prove Respect?
  - Use Effective Questions?

What Went Well?

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What Could Use Improvement?

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## an Effective Leader Exercise

the leadership skills you believe are necessary to deal with each and on the following page. Write down the ideas your group. Also talk about how you would apply the skills in each situation.

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# Sample Workbook Pages

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## CUSTOMER SERVICE

### Listening Responses Exercise



Being a good listener also means you have to be a good talker to create words and expressions in others for you to observe and listen to. How you respond to what the other person is feeling and saying goes a long way toward creating or breaking rapport.

There are many different kinds of listening responses. Some are used habitually, and the meaning is reflected more in the manner in which it is spoken rather than the actual words. Others are carefully constructed so the words and the actual definition are what you want to focus on.

Listed below are responses that are occasionally used in conversations. Read each one and circle the number that best describes how frequently you use that response on the job. Once you've completed this exercise, you will work in a small group to discuss each of the phrases and determine if there are better words and phrases you can use. It's important to be aware of the words you typically use as a listening response so you can learn what other people think about your choice of words.

I generally use phrases similar to:	Usually	Sometimes	Never
1. "You should . . ."	1	2	3 4 5
2. "You're wrong . . ."	1	2	3 4 5
3. "You better . . ."	1	2	3 4 5
4. "What you need to do . . ."	1	2	3 4 5
5. "The best thing to do now is . . ."	1	2	3 4 5
6. "My recommendation is . . ."	1	2	3 4 5
7. "Your problem is . . ."	1	2	3 4 5
8. "You feel the way you do because . . ."	1	2	3 4 5
9. "I know you don't really mean . . ."	1	2	3 4 5
10. "Yes, but . . ."	1	2	3 4 5
11. "But, what about . . ."	1	2	3 4 5
12. "You know, you should consider . . ."	1	2	3 4 5
13. "Where did you get that information . . ."	1	2	3 4 5
14. "I don't believe . . ."	1	2	3 4 5
15. "Are you sure . . ."	1	2	3 4 5
16. "I know how you feel . . ."	1	2	3 4 5
17. "You're really defensive about . . ."	1	2	3 4 5
18. "So you feel . . ."	1	2	3 4 5
19. "You are mistaken about . . ."	1	2	3 4 5
20. "Be serious . . ."	1	2	3 4 5
21. "Don't be so naive about . . ."	1	2	3 4 5
22. "Don't waste your . . ."	1	2	3 4 5
23. "My way is better . . ."	1	2	3 4 5
24. "It's not true . . ."	1	2	3 4 5

### Short-Term Meetings

If you are going to facilitate this program in a series of short-term meetings instead of two-days, divide the program into the seven segments listed below. Each segment of the program will run from around 45 minutes to three hours.

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#### Skill Practice Coaching

### LEADERSHIP

#### Skill Practice Coaching Checklist



- Does the Person Practicing:
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  - Prove Full Attention?
  - Clarify and Confirm?
  - Prove Respect?
  - Use Effective Questions?

What Went Well?

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\_\_\_\_\_

What Could Use Improvement?

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\_\_\_\_\_

RESUP

# Sample Workbook Pages

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Being a good listener als sions in others for you to is feeling and saying goe

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Listed below are respons circle the number that be you've completed this ex and determine if there ar the words you typically s about your choice of wo

**I generally use phrases**

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21. "Don't be so naive a
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23. "My way is better . . ."
24. "It's not true . . ."

CUSTOMER SERVICE

## Questioning Skills Exercise



For each work-related situation listed below and on the following page, write out your clarifying questions or statements. Use some of the questions and statements from your previous exercise. Be sure to talk out-loud with your small group to gain everyone's insights.

1. You have just picked up the phone, and the same customer you deal with each week is on the line with the same problem. What are your clarifying questions or statements?  
\_\_\_\_\_
2. An employee from another department provides you with the wrong information, yet she insists it is exactly what you need. What are your clarifying questions or statements?  
\_\_\_\_\_
3. Your supervisor wants you to work on a project, but you aren't sure you even understand what to do, how to go about it, or when it's to be completed. What are your clarifying questions or statements?  
\_\_\_\_\_
4. A manager from another team has a poor attitude and doesn't seem to take your requests seriously. You have talked to your manager about it, but it doesn't appear anything has changed. You must talk to this manager about another request for an important customer. You thought you might try to talk to him as a peer. What are your clarifying questions or statements?  
\_\_\_\_\_
5. An irate customer was transferred to you and begins the conversation by saying, "I need to speak with your manager regarding \_\_\_\_\_!" What are your clarifying questions or statements?  
\_\_\_\_\_

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MEETINGS

ies of short-term meetings instead of two-days. below. Each segment of the program will run

Leadership

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LEADERSHIP

### Skill Practice


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**Practice Coaching**

LEADERSHIP

### Practice Coaching Checklist



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# Sample Leader's Guide Pages

## Sample Two-Day Agenda

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Listening Responses	15 minutes	11:35 - 11:50
Listening Responses Exercise	30 minutes	11:50 - 12:10
Lunch	60 minutes	12:10 - 1:10
Listening Acknowledgments	15 minutes	1:10 - 1:25
Listening Skills Exercise	20 minutes	1:25 - 1:45
Skill Practice	40 minutes	1:45 - 2:25
Effective Use of Questions	15 minutes	2:25 - 2:40
Break	15 minutes	2:40 - 2:55
Questioning Skills Exercise	30 minutes	2:55 - 3:25
Skill Practice	60 minutes	3:25 - 4:25

## Short-Term Meetings

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What Went Well?

\_\_\_\_\_

What Could Use Improvement?

\_\_\_\_\_

## Skills of an Effective Leader Exercise

Small group the leadership skills you believe are necessary to deal with each situation below and on the following page. Write down the ideas your group generates. Also talk about how you would apply the skills in each situation.

Working with your team and you notice that whenever you give an idea, your idea as the one best way, no matter what you say. How do you respond?

\_\_\_\_\_

\_\_\_\_\_

# Sample Leader's Guide Pages

The times listed below are important to allow the program to be easily modified to fit your needs and make your time more efficient.

Opening the Workshop

Customer Service Excellence

Customer Service Analysis

Customer Expectations

Break

Identifying Blocks to Customer Service

Key Customer Service Skills

Recognizing the Customer's Needs

Listening Responses

Listening Responses Exercise

Lunch

Listening Acknowledgments

Listening Skills Exercise

Skill Practice

Effective Use of Questioning

Break

Questioning Skills Exercise

Skill Practice

## Customer Service Analysis

### 1) State the following and direct participants to page 3.

On page 3 you see a series of questions that are designed to be a self-audit or self-evaluation. It's important for you to be honest with yourself so you can see where to apply the skills from this program.

To do this exercise properly, put yourself in the role of one of your customers. When you do this, you should be able to see yourself performing your job along with your peers. Really concentrate so you can hear the sounds around you, including the words that are being used. You need to be that specific when you do this exercise. Once you are in that frame of mind, answer the questions on an individual basis. You have about 10 to 15 minutes to complete page 3. Does anyone have any questions?

Answer any questions.

Walk around and assist as needed. When you notice most of the groups finishing the exercise, do a quick debriefing.

### 2) State the following to debrief the exercise.

Let's go around the room and see how you answered the questions.

Gain responses.

What areas can we improve?

Gain responses.

What are some things you do well in customer service?

Gain responses.

Any other comments or questions?

Answer any questions.

All right, let's move on to the next exercise.

### 3) State the following and direct participants to page 4.

This program is designed to assist you in improving your customer service skills. However, too often employees are not always in full agreement as to who their customers are. We want to be sure that we look at both our internal and external customers.

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What Went Well?

\_\_\_\_\_

What Could Use Improvement?

\_\_\_\_\_

LEADERSHIP



Work with each group on each situation.

Share an idea, you

# Sample Leader's Guide Pages

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Customer Service Excellence

Customer Service Analysis

Customer Expectations

Break

Identifying Blocks to Customer Service

Key Customer Service Skills

Recognizing the Customer's Needs

Listening Responses

Listening Responses Exercise

Lunch

Listening Acknowledgment

Listening Skills Exercise

Skill Practice

Effective Use of Questioning

Break

Questioning Skills Exercise

Skill Practice

## 1) State the following and

On page 3 you see a self-evaluation. It's important to use the skills from this program.

To do this exercise properly, you should be really concentrated so your listening skills are being used. You need a clear frame of mind, answer questions in 2-3 minutes to complete page 3.

Answer any questions.

Walk around and assist with a quick debriefing.

## 2) State the following to discuss

Let's go around the room and discuss.

Gain responses.

What areas can we improve on?

Gain responses.

What are some things we can do better at?

Gain responses.

Any other comments or questions?

Answer any questions.

All right, let's move on to the next page.

## 3) State the following and

This program is designed to help you so often employees are not listening. We want to be sure that we are listening to each other.

## Key Skills Exercise

### 1) Direct participants to page 8.

Before you do your exercise, let's do one quickly as a group exercise. Turn to page 8. You can see the worksheet on this page. Let's say we use listening as our key skill. First, describe in as few words as possible what you mean by listening and where the skill should be applied.



Gain responses. You may want to write their responses to each question on the flip chart.

Why is listening so important?

Gain responses.

What don't you mean by listening? Remember, give me an example so I don't focus on doing something you don't mean by your definition.

Gain responses. An example might be saying you're listening while you're doing something else, or saying, "uh huh," while slightly nodding your head, all the while it's clear by looking in your eyes that you're really not paying attention. That's not what you mean by listening.

What do you mean by listening? Now give me an example of exactly what you mean. If necessary show me.

Gain responses. A positive example would be stopping everything else you're doing, putting down whatever is in your hand, looking the person right in the eye, and re-stating what he or she is saying to prove you're listening. That could be part of what you mean by listening. You could model both examples to make your point. Give your own examples that are relevant to the participants.

What we did is exactly what I want you to do in the exercise. As you just saw, it's not so easy to describe each key skill. In the exercise, try to paint word pictures. If you have a difficult time describing the skills in here, it's likely you'll also have a difficult time when you leave the workshop.

### 2) State the following for the small group exercise.

This exercise is to be completed in groups of three people. One group member is to go at a time and lead the discussion. The person leading the discussion selects one or more key skills that he or she believes is essential to his or her success. On pages 8 and 9, you can write down what you brainstorm as a group.

Under number one, write the key skill. Then move to number 2 and complete the page. Make sure your examples are specific. When one person is finished leading the discussion,

## Team Meetings

Replace a series of short-term meetings instead of two-days. The program is listed below. Each segment of the program will run for 2-3 hours.

With Leadership

Without Leadership and Blocks to Leadership

LEADERSHIP

## Skill Practice

To practice skills in this program, use any of the previous worksheets under Listening Responses or Questioning Skills. This first and is practiced in groups of three people. The person practicing the skill role and keep the conversation alive using their listening responses, and questioning skills for about 2 minutes. That's all. The person practicing is to act as an employee and respond as appropriate person in the group is the coach.

The exercise to go longer than 2 minutes. There should be plenty of time for the exercise is stopped, the coach provides his or her insight into the following two pages. Once the person coaching is finished again and tries to incorporate the coaching he or she just received are critical. If you follow the rules, and the coaches provide the exercises will be worthwhile. Outlined below are some basic exercises for the skill practice.

## Skill Practice Coaching

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## Practice Coaching Checklist

Highly Regulate the Prevailing Emotion?  
Listening Responses?  
Questioning?  
Affirm?  
Questions?

Feedback?



# Sample Leader's Guide Pages

The times listed below are important to allow the program to be easily modified to fit your needs and make your time efficient.

Opening the Workshop

Customer Service Excellence

Customer Service Analysis

Customer Expectations

Break

Identifying Blocks to Customer Service

Key Customer Service Skills

Recognizing the Customer's Needs

Listening Responses

Listening Responses Exercise

Lunch

Listening Acknowledgment

Listening Skills Exercise

Skill Practice

Effective Use of Questioning

Break

Questioning Skills Exercise

Skill Practice

## 1) State the following and

On page 3 you see a sample evaluation. It's important to use the skills from this program.

To do this exercise properly, you should be really concentrated so your words are being used. You need a clear frame of mind, answer in 5-10 minutes to complete part of the exercise.

Answer any questions.

Walk around and assist with any questions. Do a quick debriefing.

## 2) State the following to discuss

Let's go around the room and discuss the following.

Gain responses.

What areas can we improve on?

Gain responses.

What are some things that we can do better at?

Gain responses.

Any other comments or questions?

Answer any questions.

All right, let's move on to the next exercise.

## 3) State the following and

This program is designed to help you so often employees are afraid to be sure that we are doing it right.

## 1) Direct participants to page 42

Before you do your exercise, you can see the worksheet and describe in as few words as possible what you will be applying.



Gain responses. You may want to write down your responses.

Why is listening so important?

Gain responses.

What don't you mean by doing something you don't want to do?

Gain responses. An example of this is saying, "uh huh, your eyes that you're reading."

What do you mean by necessary show me.

Gain responses. A position where whatever is in your mind is saying to prove you're not doing it. You could model both examples for participants.

What we did is exactly what we need to do. It's difficult time describing what you leave the workshop with.

## 2) State the following for

This exercise is to be completed and lead the discussion. Skills that he or she believes are important to write down what you believe.

Under number one, write down your responses. Make sure your examples are clear.

## Working With An Angry Customer

### 1) State the following and direct participants to the exercise on page 42.

An important skill in customer service is the ability to work with customers in negative emotions. This is hard to do, especially when it gets pretty heated. When a customer gets angry, it's easy to forget about collaboration and move into an anger mode. The number one skill in collaborating is the ability to deal with an angry customer without getting angry ourselves. Identified on page 42 are several of the most common responses when confronted with anger.

Review "Return Anger With Anger."

Does matching anger with anger happen around here? Someone give me an example.

Gain responses.

How does that impact the situation?

Gain responses.

How do you respond to a person when you are upset or angry, and the person you're upset or angry at, returns those emotions right back at you?

Create a discussion and model an example.

Getting angry won't usually help solve a problem. It usually damages a relationship, creates resentment, and a whole host of other negative things. Our next poor response is to ignore the customer.

Review "Ignore the Customer."

It might appear natural many times to focus on the task and ignore the prevailing emotion. How do you respond to someone when you are angry, and the other person you're angry at, focuses only on the situation, and ignores your obvious emotion?

Create a discussion and model an example.

When you ignore the emotion, and focus only on the situation, it gives the impression to the customer their anger isn't valid. This tactic usually only intensifies their anger. In fact, one of the best ways to make someone angry is to ignore him or her.

Our third poor response to anger is to patronize the employee.

Review "Patronize the Customer."

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