

Who Cares?

Greet Me
Respect Me
Listen to Me
Really Help Me



LEADER'S GUIDE

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INTRODUCTION

About This Program

“Customer service just isn’t what it used to be.” That statement can’t be supported with statistics but not many people would argue it. The GOOD news is that organizations offering EXCELLENT customer service now have a greater competitive advantage than ever before! The *Who Cares?* program can play a critical role in giving your organization just such an advantage! We’ve identified and illustrated the four simple but critical cornerstones of excellent customer service:

- Greet the customer
- Respect the customer
- Listen to the customer
- *Really* help the customer!

In reality, most customer service representatives really do care. But they often neglect, or fail to remember those basic behaviors that send that caring message to your clients. It’s also too easy for them to forget the important role they play in your organization’s success. *Who Cares?* provides both the information and inspiration your staff needs to provide winning customer service. All employees within the organization will benefit from attending a program on customer service, for everyone has customers, and each of us is a customer, every day.

This Leader’s Guide is designed to help you conduct a thorough training session on customer service. It offers ideas on how to use this program in different ways, giving your organization flexibility to determine which training format is best for its specific needs. The program is 21 minutes long. On the DVD, there is an option to show the program in scenes. On the DVD, a self assessment tool is available on-screen. A Pre-Test and a Post-Test are available in this leader’s guide.

Training Points have been created on the DVD format of this program to provide visual aids when sharing important training material, or reviewing content of the program. Video links are included to provide visual reinforcement of some of the Training Points.

A PowerPoint® presentation, identical to the Training Points content of this program, has been included in both formats for your use. The customizable version is available for you to add specific information for your company. Tips for customizing this presentation are included at the end of this guide. As an alternative, the slide information may be printed or transferred to transparency sheets or a flipchart when used in conjunction with the program.

Handbooks are also available for use with this program. These handbooks may be given to participants as a helpful note-taking and reference tool. There is additional content and exercises in the handbook, which may be used during your program or for self-exploration following the course.

We recommend that you tailor the program to your organization’s needs by including specific information unique to your employees. The specifics of how you facilitate the program are up to you.

Training Materials

There are a few things you'll need for an effective training session:

- A training room located away from major distractions or interruptions
- A comfortable arrangement of chairs and tables, preferably in a circular pattern, with an opening for a TV monitor and other visual aids. (Be certain all participants can see the TV monitor and other visual aids)
- Adequate lighting that can be adjusted while viewing the program
- A location, possibly including a podium and/or a flipchart, from which the trainer/speaker can lead discussion
- The training program *Who Cares?*
- TV and VCR or DVD player/computer with projector and remote
- Copies of the class agenda
- A copy of the handbook, paper and pencil for each participant
- A flipchart or dry-erase board and appropriate markers
- A computer with PowerPoint® software and the PowerPoint® Presentation
- Copies of any Worksheets you plan on using, as well as the Post-Test and Evaluation.

Preparation

Preparation is the key to effective training. Do these things prior to the session:

Establish Objectives

Determine the training objectives in advance so that you can identify the approach to take for the training session. It is also important to decide what level of understanding is expected from participants upon completion of the training.

Suggested training objectives for this presentation are:

- Describe the state of customer service today.
- Identify the importance of appropriately greeting your customers.
- Explain how to demonstrate respect for all customers.
- Demonstrate listening techniques to understand the customer's perception.
- Identify ways to most effectively help the customer.
- Explain how to manage an encounter with a difficult customer.

Feel free to edit the training objectives to meet the particular needs of your organization. Training objectives should reflect the content of the program.

Determine the Audience

Another aspect to consider in planning this training session is the audience. Tailor your presentation to the skills or experience of the participants. The focus of your discussion and the depth of content presented may vary, depending on whether you are providing an orientation for new employees or a refresher course for all employees.

The training group size should range from 10 to 20 people. Most of the exercises in this program require that the group break into two smaller groups in order to increase participation. When the group is too large, individual attention may be lost.

Agenda

1 1/2-Hour Session Agenda

Introduction	10 minutes
Program & Discussion	45 minutes
Exercise 1	10 minutes
Exercise 2	15 minutes
Session Summary	10 minutes

2-Hour Session Agenda

Introduction	5 minutes
Program & Discussion	40 minutes
Exercise 1	10 minutes
Exercise 2	15 minutes
Exercise 3	20 minutes
Exercise 4	20 minutes
Session Summary	10 minutes

Invite Participants

Send out letters or memos to participants or post a notice two weeks in advance of the training date. State the location, date and time, and meeting agenda. Administer the Pre-Test in advance.

Sample Invitation

Date: (Insert date)

To: All Employees

From: Kevin O'Brien, Human Resources Manager

Re: *Who Cares?* Training Session

Customer service. Who cares? Really, you should. When was the last time you thought about the impact your service has on the relationship with your customers or our overall success? It matters, you know. Customer service is the key ingredient to customer retention. Plan to make time in your day to attend an upcoming session focusing on you and how you can show your customers you care about their patronage. This highly interactive program will be an opportunity for you to address situations that you encounter in your job. Pay particular attention to the questions on the enclosed Pre-test, and return this Pre-Test to me by (insert date). We'll be using some of the situations shared during the session.

Please plan to be at the training session on (insert date), at (insert time). We will be meeting in the main conference room for a one and one-half hour session. If you are unable to attend, please contact me as soon as possible.

During this program you will have an opportunity to:

- Describe the state of customer service today.
- Identify the importance of appropriately greeting your customers.
- Explain how to demonstrate respect for all customers.
- Demonstrate listening techniques to understand the customer's perception.
- Identify ways to most effectively help the customer.
- Explain how to manage an encounter with a difficult customer.

Agenda:

Introduction	2:00 – 2:10
Program & Discussion	2:10 – 2:55
Exercise	2:55 – 3:20
Session Summary	3:20 – 3:30

Please mark your calendar so you can attend this very important training session.

Thanks!

Presentation Tips

Overcoming anxiety

The best way to overcome anxiety about speaking before a group is to be prepared. Although it is natural to be nervous, your sweaty palms will disappear once you focus on what you are saying. Concentrate on communicating your message and your presentation will flow naturally.

Choosing your vocabulary

It's best to use the same comfortable language that you would use when speaking one-on-one. Avoid jargon and overly complicated words or phrases.

Getting rid of the “umms”

One of the most annoying mistakes a speaker makes is saying “umm” every time there is a break between thoughts. Remain silent while you think about what you're going to say next. The silence will seem longer to you than it will to the audience. If you remember this, you'll feel less pressure to fill the silence. You can control your “umms” by jotting down notes beforehand. If you want to include personal anecdotes or examples, write down a few notes to trigger your memory. Beware of writing down too much, however. You'll deliver your message to your note cards instead of your audience.

Controlling the speed and tone of your voice

You'll put your audience to sleep if you speak too slowly, and they won't be able to keep up with the content if you speak too quickly. Approximately 150 words per minute is the best speed (that's about two thirds of a page, typed, double-spaced). Vary your tone often, especially when making an important point. Adding emotion to your presentation will keep your audience involved. Again, strive for a conversational tone.

Sticking to the schedule

Begin class on time and restart the session promptly at the end of the break. Except for emergencies, participants should not be interrupted for messages.

Asking for questions

Ask for questions throughout the session. Be prepared to answer all types of questions, but don't be worried you don't know every answer. You can simply say, “Let me find out for you and get back to you.” Keep in mind many questions are best answered through discussion. An appropriate response might be, “Good question. Let's hear some discussion on that one.” Watch the clock, though. Too many unplanned discussions can eat up your time.

TRAINING SESSION OVERVIEW

Giving the Pre-Test

It is recommended that you give the Pre-Test prior to the training session. That way, you will have an opportunity before the session begins to review participant's answers and get an idea of what they already know. Otherwise, administer the Pre-Test at the start of the session so you can review participant's responses during the break.

Presentation Outline

Introduce yourself and the training session. Welcome the participants and offer a brief explanation of how the session will be beneficial to both the participants and the organization. Have participants introduce themselves and state the department or area in which they work. Use an "ice breaker" to relax the class. One is provided in this guide.

Use Slide 2 to introduce the objectives of the training session:

- Describe the state of customer service today.
- Identify the importance of appropriately greeting your customers.
- Explain how to demonstrate respect for all customers.
- Demonstrate listening techniques to understand the customer's perception.
- Identify ways to most effectively help the customer.
- Explain how to manage an encounter with a difficult customer.

Be sure participants understand what you expect them to learn and what skills they need to display as a result of this training. Knowing what is expected in advance better prepares the employees and helps them to participate successfully.

Start the program. To avoid unpleasant surprises, it's a good idea to pre-set the volume of your monitor before the training session begins.

DISCUSSION GUIDE

Scene-Specific Discussion Guide

The seven chapters in this program help facilitate discussion. This guide is broken down with a summary of each segment of the program, offering discussion ideas and/or further exercises for each. The handbook is also a valuable tool for participants to use during the discussion and exercises, and to take back to their workplaces as a handy resource following the program.

The Fact Is...

Examples most participants can relate to are used to illustrate the state of customer service today. Slides 3 & 4 provide some supporting statistics. At the end of the scene a series of three statements are provided for discussion. Once participants have arrived at consensus of “true” or “false” for each, select their response. If correct, their selection is affirmed. If incorrect, remediation is offered. Continue the discussion using the following:

- *Think of a time you were dissatisfied with the service you received. What happened? What did you do? Who did you tell about your situation?*
- *Statistics indicate that a dissatisfied customer tells at least 10 others of her dissatisfaction. Would you agree?*
- *Why was the way Barbara handled her treatment in the paint store ineffective?*
- *Statistics also show 96% of dissatisfied customers never tell the business of their dissatisfaction. Would you agree?*
- *If Dave considered his customer’s perspective how would the interaction with a customer like Barbara change?*
- *How do you show you care?*

Greet Me

The focus of this scene is on greeting the customer. At the end of the scene the question “How do you greet your customers?” is offered for discussion. Continue the discussion by asking:

- *If greeting a customer is one of the easiest ways to make a customer feel cared about, why is this step so often skipped?*

Tell participants:

- *On page 7 of the handbook there’s a list of typical customers’ greetings. If yours is not on the list, add it!*

Respect Me

Everyone wants respect, but not everyone gets it. Your customers should. During this scene participants learn tips for offering respect. At the end of the scene a series of three statements is offered for discussion. Once participants have arrived at consensus, select their response. If correct, their selection is affirmed. If incorrect, remediation is offered.

Ask participants:

- *What's the easiest way to show respect for your customers?*
- *Is perception reality? Why or why not? How can perception impact your ability to offer respect?*
- *How do you show respect without coming off as condescending?*
- *Why does what we don't say deliver more of a message than what we verbalize?*

Guidelines for offering respect are provided on page 9 of the handbook.

Listen to Me

During this scene participants learn how to apply reflective listening skills. At the end of the scene the question “How can the perception of the customer make or break the sale?” is offered for discussion. Follow up this discussion using Exercise 3: “Are You Listening?” Page 10 of the handbook reviews reflective listening.

Really Help Me

Features tell, benefits sell. This scene provides an opportunity to discuss how to really help customers. Knowing the product or service you offer, and ways to exceed a customer's expectations are highlights of this scene. At the end of the scene the question “Consider your typical customer interaction. What else could you do to really help your customer?” is provided for discussion. Continue the discussion with the following:

- *What else could the hotel desk clerk have done to really help the customer?*
- *How can you under-promise and over-deliver service to your customers?*

Review questions to ask if you don't know how to exceed customer expectations on page 12 of the handbook.

Difficult Customers

We all have encounters with customers that are rather challenging. Participants are encouraged during this scene to find that a dissatisfied customer really wants what any customer wants: to be greeted, respected, listened to and helped. At the end of the scene a multiple choice question is provided for discussion. Once participants have arrived at consensus, select their response. If correct, their selection is affirmed. If incorrect, remediation is offered. Using Slide 12 and page 13 of the handbook, review tips for managing a difficult encounter with a customer.

Summary

Use this scene to conclude the program. Slide 13 may be used in review.

ICEBREAKERS

Icebreaker 1: What's He Worth?

Time: 5 minutes

Materials: Copy of Worksheet 1: The Lifetime Value of a Customer for each participant

Purpose: To illustrate the value of a customer.

Remind participants that everyone has customers, and ask them:

- Who are your customers?
- What's your customer worth to you?
- Do you know the lifetime value of your customer?

Distribute the worksheet and allow participants a few minutes to complete the formula. Ask participants:

- Which customer did you choose for this exercise?
- What was your customer's lifetime value?

Consider running a total to illustrate the value of all the participant's customers.

EXERCISES

The following exercises are provided for use during or after the discussion. Refer to the agenda to determine which exercises you have scheduled in your training session. Make sure you stick to the time schedule for each exercise to avoid running out of time at the end of the training session.

Exercise 1: Greet Me with a Smile

Time: 10 minutes

Materials: A mirror for each pair of participants.

Purpose: To illustrate the power of greeting with a smile.

Instructions: Ask participants to pair up with another person and sit back-to-back. Distribute a pencil, some paper and a mirror to each pair. Have one person in the pair take observation notes as the other person reads the script below with a smile, and then without a smile. Have the participants use the mirrors as they read the script to encourage a noticeable, genuine smile. Have participants switch roles.

After five minutes, reconvene and discuss observations. Ask participants:

- *Did you feel a difference when you spoke with a smile?*
- *Do you think the customer would hear a difference?*
- *What impact do you think a smile would have on your relationship with the customer?*

Script: Hi, my name is _____ from _____ (company). I am following up on our call from earlier this morning. I found the information that you requested. Do you have a moment?

Exercise 2: R.E.S.P.E.C.T.

Time: 15 minutes

Materials: Flip chart or whiteboard and appropriate markers.

Purpose: To help participants gain a stronger comprehension of the power of respect.

Instructions: Ask everyone to find someone in the room who they do not know. Instruct them to introduce themselves to that person, and spend five to ten minutes talking about respect using the following question:

- *What does it mean for you to show respect, and what does it mean for you to be shown respect?*

After the ten minutes, ask the participants to return to their seats, and open the discussion. What ideas did people come up with? Record their responses.

Exercise 3: Are You Listening?

Time: 20 minutes

Materials: None

Purpose: To provide participants an opportunity to try reflective listening skills.

Instructions: Ask participants to pair up with a person they know fairly well, and talk about a problem, concern or issue for 3 minutes. The listener then practices reflective listening. Switch roles, and repeat the exercise.

Ask participants:

- *Did you feel listened to?*
- *Did your partner understand you?*

Exercise 4: Really Help Me

Time: 20 minutes for each scenario discussed

Materials: Scenario cards prepared using the template found in the worksheet section of this guide, and a flipchart to record ideas.

Purpose: To provide participants an opportunity to explore alternative solutions to service challenges at their organization.

Instructions: Divide participants into groups of 4-6. Distribute scenario cards. Tell participants that they are to brainstorm alternative approaches and solutions to one of the scenarios they received. When dialogue tapers, ask each group to share their scenario and alternatives generated. Record the ideas, and consider providing these after the session to all participants. Continue with additional scenarios as time allows.

SESSION SUMMARY

Summarize

One summarizing technique is to review the course objectives with the class. Another technique is to ask each participant to summarize what was learned from the training session. Ask the participants if they have any final questions.

Administer the Post-Test

Prior to the program, decide which tool to use for assessment. On the DVD, an on-screen self assessment form is available. The handbook includes an easy to score quiz. A Pre-Test and a Post-Test have been included in this leader's guide. These assessments are an excellent tool for determining how much each participant learned during the session.

Evaluation

Distribute the evaluation form to each participant when he or she has finished answering the questions on the Post-Test. When each class member turns in the evaluation form, thank him or her for attending and contributing to the session.

PRE-TEST

Please read each question carefully and write your answer in the space provided below it.

1. Think about a time when you met a customer's needs. What did you do, and why did your response work?

2. Consider a time when you were unable to meet your customer's needs. Describe the problem and the solution(s) offered. Include the customer's response.

POST-TEST

Please read each question carefully and write your answer in the space provided below each question.

1. Why doesn't a customer tell the service provider of his dissatisfaction?

2. What is the foundation of customer service?

3. What's the easiest way to show your customers you care?

4. How can you show respect for the customer?

5. How do you listen reflectively?

6. In what ways can you really help your customers?

7. How should you manage a difficult encounter with a customer?

8. What are the 4 critical steps to giving great customer service?

POST-TEST ANSWER KEY

1. Why doesn't a customer tell the service provider of his dissatisfaction?
Customers often express feelings of:

 - Intimidation
 - Embarrassment
 - Not worth the bother.
2. What is the foundation of customer service?
The foundation of customer service is caring for the customer and his needs.
3. What's the easiest way to show your customers you care?
Show your customer you care by making the effort to greet them.
4. How can you show respect for the customer?
Answers should include:

 - Value the customer
 - Be polite
 - Value the customer's time
 - Don't judge the customer
 - Take customer concerns seriously
 - Thank the customer.
5. How do you listen reflectively?
 - Listen without interruption
 - Repeat back what you heard.
6. In what ways can you really help your customers?
 - Know your product or service
 - Communicate clearly
 - Update waiting customers
 - Follow through on promises
 - Exceed their expectations.

7. How should you manage a difficult encounter with a customer?
 - Stay calm
 - Don't argue
 - Apologize for inconvenience.

8. What are the 4 critical steps to giving great customer service?
 - Greet them
 - Respect them
 - Listen to them
 - Really help them.

SAMPLE

WORKSHEETS

Worksheet 1: The Lifetime Value of a Customer

Instructions: Consider your typical customer. Fill in the blanks and operate the calculation.

\$ _____ spent annually X _____ length in years of relationship =

\$ _____ lifetime value of customer

OR

\$ _____ estimated average sale X _____ # of times the customer reorders =

\$ _____ lifetime value of customer

Worksheet 2: *Really* Help Me Scenario Cards

Type one of the scenarios offered from participants Pre-Tests here. Make as many copies of these cards as necessary. Try to have at least 2 scenarios per 4 participants. Depending on how often the cards will be used, consider copying on colored cardstock or laminating the cards.

Type another scenario here. You may adjust the size of the cards so that they are the same by adding returns above and below the scenario.

Empty rectangular box for scenario card content.

Empty rectangular box for scenario card content.

COURSE EVALUATION

Your input is **IMPORTANT** in helping us evaluate and improve our training programs. Thank you for taking time to think about and respond to the following questions.

Course: _____ Date: _____ Facilitator: _____

About the Course

1. Were the objectives of the course clearly stated? YES NO
2. How well were the objectives met by the course?
Were not met 1 2 3 4 5 Were met very well
3. How applicable will this training be to your job?
 - Almost none of the material will be applicable to my job.
 - Some will be applicable, but some was confusing or irrelevant.
 - Absolutely applicable! I look forward to seeing results soon!
4. Was the information presented in a logical and understandable order?
 - Didn't seem logical at all.
 - Some was, some wasn't.
 - Yes, all of it seemed logical and understandable.
5. How useful were the discussions and the exercise(s) in helping you learn the information?
 - Not useful at all Somewhat useful Very useful
6. To what extent did this training meet your expectations?
 - DID NOT meet my expectations MET expectations
 - EXCEEDED expectations
7. What would you add or change to improve this course?

About the Facilitator

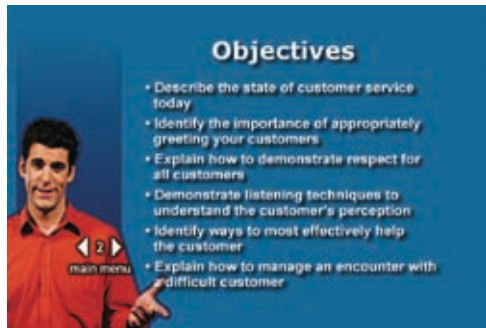
8. Was the facilitator positive and professional? Very much so Could improve
9. How well was the facilitator prepared and able to explain the information?
NOT well prepared 1 2 3 4 5 VERY well prepared
10. Did the facilitator create an atmosphere that encouraged questions and learning?
 - Yes No – Facilitator should have: _____
11. Did the facilitator explain the material in ways that made it applicable to your job?
 - Very much so Sometimes Almost none was connected to my job
12. Your comments on the facilitator: _____

TRAINING POINTS AND POWERPOINT® OVERVIEW

SAMPLE

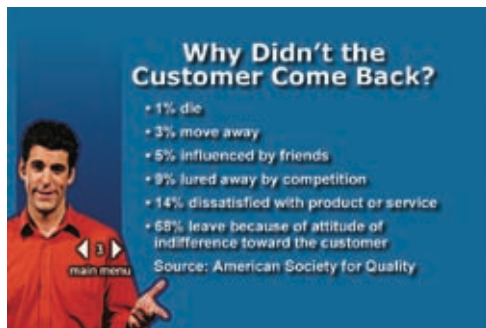


Title Slide



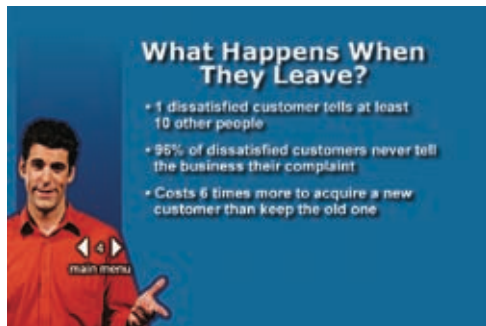
Slide 2 – Objectives

Use this slide to review your objectives for this program. Be sure to ask participants if they have any additional objectives they would like to be addressed.



Slide 3 – Why Didn't The Customer Come Back?

The good news is that if 68% of customers leave because of an attitude of indifference, 68% could stay if we show we care!

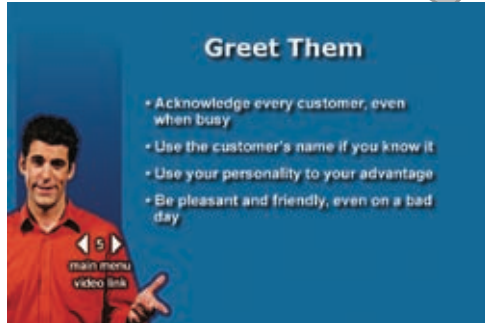


Slide 4 – What Happens When They Leave?

This slide shows all the more reason to keep customers happy! Damage control is very costly.

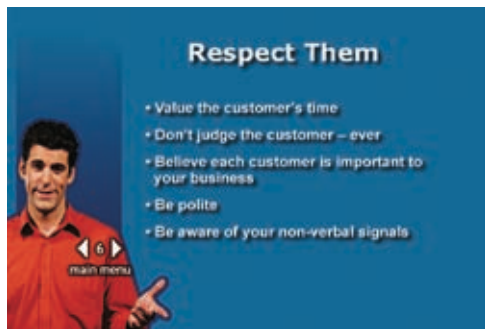
TRAINING POINTS AND POWERPOINT® OVERVIEW CONTINUED

Slide 5 – Greet Them



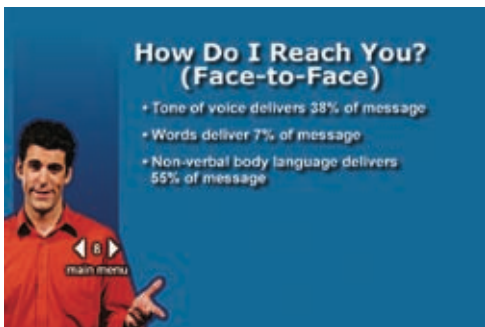
A video link is provided on this slide in the Training Points section of the DVD. The scene is of a woman who was greeted appropriately, but for whom the remainder of the experience went awry. Ask participants: The service person did not really stay with this customer. Is this ever acceptable? What other tips can you offer for greeting customers?

Slide 6 & 7 – Respect Them



A video link is provided on slide 7 in the Training Points section of the DVD. This scene features a customer who was accused of lying.

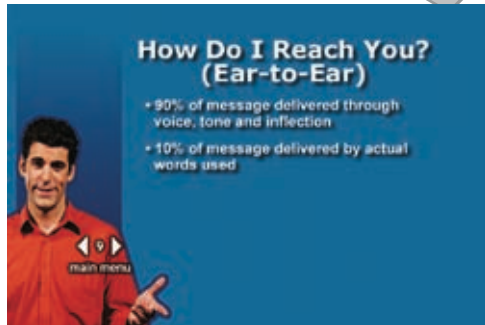
Ask participants:
 Why is it hard not to judge a customer?
 How can you avoid judging?
 What do you do to remember the value of each customer?



Slide 8 – How Do I Reach You? (Face-to-Face)

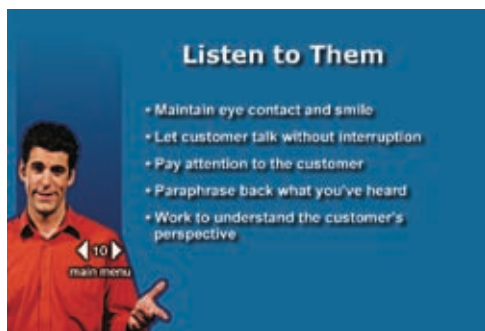
If non-verbals deliver over half the message we communicate, how do we control the impact of our delivery?
 How can you be sure your tone of voice is appropriate?

TRAINING POINTS AND POWERPOINT® OVERVIEW CONTINUED



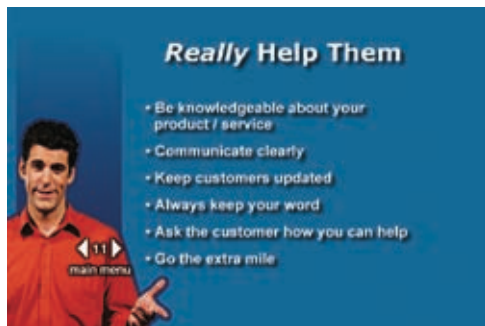
Slide 9 – How Do I Reach You? (Ear-to-Ear)

What can you do when communicating with a customer over the phone or internet to be sure you come across as if you care?



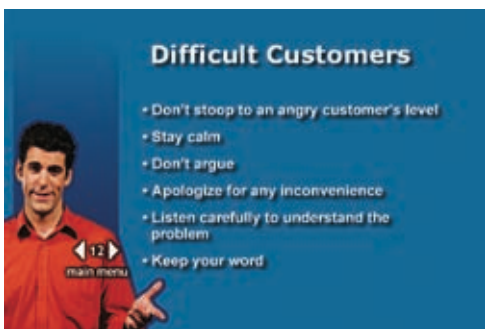
Slide 10 – Listen to Them

What are some of the things you can say or do to show the customer you are listening?



Slide 11 – Really Help Them

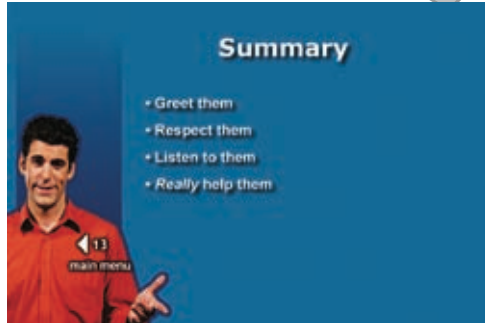
How do you really help your customers?



Slide 12 – Difficult Customers

Consider a time when you may have been perceived as a difficult customer. What could the customer service representative have done differently to manage your dissatisfaction?

TRAINING POINTS AND POWERPOINT® OVERVIEW CONTINUED



Slide 13 – Summary

Use this slide to review the four critical steps to providing great customer service.

CUSTOMIZING A POWERPOINT PRESENTATION

The PowerPoint® presentations included on the Coastal DVD and CD products are customizable when used on a computer loaded with Microsoft PowerPoint® software. (Note: In the following instructions, “click” implies a click with your left mouse button. If a “right” click is necessary, it will be so indicated.) Microsoft PowerPoint® has many features. The following steps will help you customize our presentations quickly.

To customize a presentation:

If the “Customizable Version” icon is displayed on the landing screen, click on this option. If this option is not available, click on the PowerPoint® presentation to open it.

Save this presentation to another location, such as your hard drive or a folder on the network. You will make your customizations on the saved version.

To add, copy, hide or remove a slide, or to change the order of the slides in the presentation:

Click on “View” on the menu bar.

Click on “Slide Sorter” from the “View” menu. Or, under the “Normal” view, you may use the “Outline” on the left side of the screen.

To add a slide, place your cursor in front of the slide where you want to add a slide. Click on “Insert” on the menu bar. Then, click on “New Slide” on the “Insert” menu. Or, click on the “New Slide” tool on the tool bar. Choose a slide format to fit your desired content, and follow the prompts given.

Sometimes it’s easier to copy a slide, and then change the content of the slide than to create a new one. To copy a slide, click on the original slide. Click on “Edit” on the menu bar, and choose “Duplicate.” A new copy will be created to the right of the original slide. Or, click on “Edit” on your menu bar, and choose “Copy.”

You may then “Paste” the slide wherever you want it to appear.

To hide a slide from your presentation, but to keep it for future use, right click on the slide you wish to hide, and choose “Hide Slide” from the menu. Or, click on the “Hide Slide” tool on the tool bar.

To remove a slide from the presentation, click on the slide you want to remove. Click on “Edit” on the menu bar. Then, click on “Delete Slide” on the “Edit” menu. Or, click on the slide, and press the “Delete” key on your keyboard.

To change the order of the slides in the presentation, click on the slide to be moved and while holding the mouse button depressed, drag the slide to its new location. Release your mouse button to place the slide.

If you wish to change or remove the animation effect as you move from slide to slide:

Double click on the slide you want to change the animated transition on.

Double click on the text box of the slide. A border and white handles appear around the text box.

Click on “Slide Show” on the menu bar. Then, click on “Preset Animation.” To turn off the effect, choose “Off.” If you wish to change the effect, there are many options to consider.

To edit content of any slide:

Double click on the slide you want to change.

Double click on the text box of the slide. A border and white handles appear around the text. Type the desired changes.

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