

# AN ADA CUSTOMER SERVICE COURSE FOR EMPLOYEES

LEADER'S GUIDE — **PREVIEW HIGHLIGHTS**

A McGUIRE ASSOCIATES, INC. PRODUCTION

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## PROGRAM OVERVIEW

This program is designed to help you teach all your employees how they can properly provide superior customer service to customers with disabilities. This includes:

- Customer who are blind or have low vision
- People who are deaf or are hard of hearing
- Patrons with mobility impairments, including customers who have wheelchairs

It also includes customers who have hidden disabilities:

- People with cognitive disabilities
- People with emotional challenges
- And other disabilities, such as autism, Tourette Syndrome, and head injuries

The program is divided into five chapters:

- Chapter 1: Blind or Low Vision
- Chapter 2: Cognitive Disabilities
- Chapter 3: Deaf or Hard of Hearing
- Chapter 4: Mobility
- Chapter 5: People of Short Stature/Vertically Challenged

In this program, you will learn about the four major interactions you'll have with customers with disabilities, including:

- Greeting
- Product Assistance
- Sales Transaction
- Addressing Other Needs

The goal of this program is simple: it will help every employee deliver the best customer service to people with disabilities. It will also help every employees deliver the best customer service to elderly customers.

You will notice that throughout the program, the terms disabled person or blind person haven't been used. Instead, you will hear "person with a disability" or "person who is blind." The point is simple: put the person first. This is not simply about language; it's about treating people with disabilities as customers and delivering the best service possible.

## IMPORTANT LEGAL NOTICE

*An ADA Customer Service Course for Employees* is intended as a resource to help organizations communicate their policies and expectations to their employees and managers and to help them reach their goal of providing superior service to customers with disabilities.

It is not intended to provide legal advice or to answer specific legal questions.

All legal questions should be referred to the organization's legal counsel.

## USING THIS PROGRAM IN A TRAINING SESSION

*An ADA Customer Service Course for Employees* provides a practical set of guidelines for anyone who has interactions with customers with disabilities. Everyone can benefit from better understanding the optimal way to deliver superior service to customers with disabilities. Audiences who will find the video particularly useful include:

**MANAGEMENT AT ALL LEVELS:** Managers at all levels need to have a solid understanding of the key messages in this program. That way, they can work proactively with employees to ensure that customers with disabilities are being served in the best way possible and that the organization is complying with the ADA (The Americans with Disabilities Act) in the delivery of service to customers with disabilities.

**ORGANIZATION-WIDE TRAINING:** The message of *An ADA Customer Service Course for Employees* is a universal one. Any employee who may have an interaction with a customer who has a disability should view the program.

## SUGGESTED TRAINING AGENDA

The agenda provided below will help you prepare for your training session. It can easily be modified to fit your needs and or desired timeframe. On the following page, we have also provided you with an untimed agenda so that you may customize your own training agenda.

### 1.5 Hour Agenda

	Time	Page
1. Introduce the training session to participants	5	11
2. Watch the DVD	35	12
Break	10	--
3. Discussion and participate	15	13
4. Post Training Test	15	14
5. Session Debrief	10	15

# CREATE YOUR OWN AGENDA

You may wish to plan your own customized agenda that is different from the ones on the previous page.  
Here is a blank agenda for you to use.

ACTIVITY

TIME

PAGE

ACTIVITY	TIME	PAGE



# CHECKLIST FOR FACILITATOR

This checklist will help you gather everything you need to complete this training session.

## MEETING PREPARATION

- Write down your training objectives.
- If you would like, you can send the Program Overview (page 3) to your participants prior to the training session.

## LOCATION

- Book the room in advance.
- Create an atmosphere that is conducive to learning.
- Provide a surface for writing and be sure that it's adequately lit.
- Check for sound.
- Be sure all of the seats have a good view of the visuals.

## EQUIPMENT

- Make sure the DVD player or computer is working.
- Check the DVD all the way through to be sure it works properly.
- Check any other equipment you will be using in advance of the session.

## MATERIALS

- Leader's Guide
- DVD of "*An ADA Customer Service Course for Employees*"
- Paper and pens or pencils and nametags
- Print employee post-test copies to distribute

## MESSAGE TO THE FACILITATOR

You don't have to be a professional trainer (or a lawyer) to use this program. You should view the program in advance to ensure that you are fully knowledgeable about all the lessons included in the program.

Allow participants to share their thoughts and experiences interacting with customers with disabilities. Engage participants in a discussion of the lessons contained in *ADA Customer Service Course for Employees*. When you are preparing the program, remember the following:

- Create an environment where participants feel free to have an open discussion.
- Send out a memo to participants with an agenda and the goals you wish to accomplish ahead of time.
- Make sure you watch the DVD several days before the training session so you are familiar with the content.
- Invite people to sit up front and not hold back.
- Send an e-mail one day in advance to remind participants of the date and time of the training session.
- Remind each participant that there will be a post-training test.

# TRAINING AGENDA 1: INTRODUCING THE TRAINING SESSION

**Time Required:** 5 Minutes

**Objective:** This program and training session is designed to increase awareness and provide each participant with the knowledge to deliver the best service for customers with disabilities.

Introduce yourself and explain what you hope to accomplish. Smile, make eye contact, and tell them something about yourself. Have everyone introduce themselves to one another.

Tell your participants/audience the goals of this training session and the chapters that will be covered in the session. Remind participants of your organization's customer service philosophy and explain how this program aligns with your organization's goal of providing the best service to all customers.

Explain to the group that there are five chapters in this program, which all deal with customers with disabilities.

Explain to everyone that these points will be fully explored when they watch the video. Ask them to take notes as they watch the video and to start thinking about how they can implement the lessons in their jobs.

Remind each participant that they will be given a test at the end of the training session.

## TRAINING AGENDA 2: SHOWING THE DVD

**Time Required:** 35 minutes

**Objective:** To learn about delivering optimal service to customers with disabilities and to put *An ADA Customer Service Course for Employees* to work for each participant.

Watch the DVD: *An ADA Customer Service Course for Employees*.

PREVIEW

## TRAINING AGENDA 3: DISCUSSION, POST-VIEWING TEST & DEBRIEF

### DISCUSSION

**Time Required:** 15 minutes

**Objective:** To review and reinforce the lessons found in the program and to recap your organization's commitment to delivering optimal customer service to people with disabilities.

In this guide and on the video, you will find questions for discussion for each of the five chapters. Please use these questions as well as the DVD recap questions to remind and reinforce the messages in the program.

You also will find several handouts, which can be used to test people on their knowledge. These handouts can be found on the CD-ROM that comes with this program. They can be used in the post training test agenda:

- Use the "Terms and Expressions" sheet to review inaccurate and preferred terms.
- Use the Training Review Quiz to test an employee's knowledge
- A Multiple Choice & True/False Quiz for each chapter is also included.

## TRAINING AGENDA 3: DISCUSSION, POST-VIEWING TEST & DEBRIEF (CONTINUED)

### Post Training Test

**Time Required:** 15 Minutes

**Objective:** This will allow you to test participants on the lessons found in the program. This test is in five parts, corresponding to each of the five chapters. The handouts for this test can be found on the CD-ROM that accompanies this program and also in this Leader's Guide.

- *Blind or Low Vision* Quiz can be found on Page 21.
- Cognitive or Emotionally Disabilities Quiz can be found on Page 30.
- Deaf or Hard of Hearing Quiz can be found on Page 36.
- Mobility Quiz can be found on Page 42.
- People of Short Stature/Vertically Challenged Quiz can be found on Page 47.

In addition, there is a Training Review Quiz on Page 49 and a Terms and Expressions guide on Page 55. Separate PDF documents for each of these quizzes can be found in the CD-ROM.

## TRAINING AGENDA 3: DISCUSSION, POST-VIEWING TEST & DEBRIEF (CONTINUED)

### DEBRIEF

**Time Required:** 10 minutes

**Objective:** This final 10- minute segment will allow you to solicit reactions from your audience and to remind attendees of your organizations commitment to compliance with the ADA – The Americans with Disabilities Act. Your organization’s legal counsel may also want you to speak to specific issues or distribute other documentation.

## BLIND OR LOW VISION – KEY LESSONS

Here are some of the key lessons from Chapter 1: Blind or Low Vision Customers:

- If you observe someone who is blind or low vision, feel free to approach them, tell them that you're an employee and ask if you can be of assistance. Mentioning that you're an employee is important because the person lacks visual cues such as a name badge or a uniform.
- Verbal directions should be specific and should be given from the perspective of the customer's current position. Using clock positions to describe a physical space is another helpful technique. The same clock technique can be helpful in dining to describe the position of food on a plate.
- Use the "sighted guide technique" to guide a customer who is blind or has low vision. To begin guiding, go to the side of the person opposite the white cane or guide dog. You should never grab a person's arm or white cane during the interaction.
- It is common for someone who is blind or has low vision to request help when making a purchase – especially when the customer is alone. Before guiding the customer through the aisles, ask if he or she has a list of specific items.
- As you walk with the customer through the store, a concise description of the products is important. The best approach is to have an interactive dialogue with the customer.



## BLIND OR LOW VISION – KEY LESSONS (CONTINUED)

- There are three challenges for customers who are blind or low vision when ordering food in a café style restaurant: 1: Knowing when someone is available to take an order, 2: Lack of access to a menu, and 3: Locating and navigating to a table while carrying a tray of food.
- Before taking an order from a customer who is blind or low vision, make sure to identify yourself, that way the customer knows you're ready to take the order. Be prepared to read the menu – especially if the customer is alone.
- After the order has been placed, the customer may require assistance to find a table. You can proactively offer to guide the customer to a table.
- If the customer is with a companion, speak to the customer directly. You should not address questions about the customer's order to the companion.
- Since all paper currency in the United States is the same size, most customers fold each denomination of currency in a specific way for easy identification. When returning money to a customer who is blind or has low vision, hand him or her each bill separately and announce its value.
- During a credit card transaction, the customer may ask for help positioning their pen for the signature.

## BLIND OR LOW VISION – KEY LESSONS (CONTINUED)

- It is important to clearly announce the final checkout amount. Be prepared to read the itemized receipt, as the customer cannot see the display as items are scanned or entered.
- In a restaurant, wait staff should not only announce the amount of the bill, they should also indicate where to include a tip if a credit card is being used.

# BLIND OR LOW VISION – GROUP DISCUSSION QUESTIONS

These questions are designed to generate group discussion following the screening of the program. Use the lined space below each question to modify the questions or to take notes on relevant comments that arise during the discussion.

Ask your group about the lessons and examples found on the Blind or Low Vision chapter of the program. What did they learn? What, if anything, was new for them?

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Discuss how you can best apply the lessons from the Blind or Low Vision chapter to the specific space, products, and services in your organization.

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# BLIND OR LOW VISION – DVD RECAP QUESTIONS

The following questions are included at the end of the *Blind or Low Vision* chapter of the DVD.

1. What is the proper way to guide someone who is blind or has low vision?
2. In a cash transaction, how do you give change to a customer who is blind or has low vision?
3. Have you ever assisted a customer or friend who is blind or has low vision? If so, please describe.
4. Do you feel more confident interacting with someone who is blind or has low vision after watching this chapter?

Your Notes:

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## BLIND OR LOW VISION – TRUE/FALSE & MULTIPLE CHOICE QUIZ QUESTIONS WITH ANSWERS

1. When a customer is blind or has low vision what should you do when you approach that customer?

- a. Mention that you are an employee
- b. Ask them if they need assistance
- c. Identify yourself by name
- d. All of the above

Answer: d

2. When you are guiding a person who is blind or has low vision, what is one way to give them directions to help guide them?

- a. Counter clock technique
- b. Diagonal technique
- c. Clock technique
- d. Circular technique

Answer: c

3. It is unusual for someone who is blind or has low vision to request help when making a purchase. TRUE or FALSE (Circle one)

Answer: FALSE (It is common for someone who is blind or has low vision to request help when making a purchase – especially when the customer is alone. Before guiding the customer through the aisles, ask if he or she has a list of specific items.)

## BLIND OR LOW VISION – TRUE/FALSE & MULTIPLE CHOICE QUIZ QUESTIONS WITH ANSWERS (Continued)

4. What techniques should be used when guiding a blind or low vision customer when describing the position of food on a plate?

- a. Counter clock technique
- b. Diagonal technique
- c. Clock technique
- d. Circular technique

Answer: c

5. If a customer who is blind or has low vision and is with a companion, whom do you speak to?

- a. Your co-worker
- b. Their companion
- c. The customer
- d. Both the customer and their companion

Answer: c

6. When approaching a blind or low vision person by using the "sighted guide technique" you always go to the side of the white cane and or sight dog. TRUE or FALSE (Circle one)

Answer: FALSE (You should go to the side of the person opposite the white cane or guide dog. You should never grab a person's arm or white cane during the interaction.)

## BLIND OR LOW VISION – TRUE/FALSE & MULTIPLE CHOICE QUIZ QUESTIONS WITH ANSWERS (Continued)

7. When a blind or low vision customer is making a purchase most customers will fold each denomination of currency in a specific way for easy identification. When returning money to that customer how should you hand him or her the money?

- a. All together
- b. In large bills
- c. Each bill separately
- d. In single dollar bills

Answer: c

8. During a credit card transaction you should clearly announce the final checkout amount and be prepared to read the itemized receipt. The customer may also ask for help with where to sign the credit card. TRUE or FALSE (Circle one)

Answer: TRUE

9. In a restaurant, wait staff should not only announce the amount of the bill, but they should also indicate WHAT if a credit card is being used?

- a. Help positioning their pen for signature
- b. Location of the rest room
- c. Type of credit card
- d. Area for the tip and ask for the tip amount
- e. a & d

Answer: e

## BLIND OR LOW VISION – TRUE/FALSE & MULTIPLE CHOICE QUIZ QUESTIONS WITH ANSWERS (Continued)

10. There are three challenges for customers who are blind or low vision when ordering food in a café style restaurant. They are:

1. Knowing when someone is available to take his or her order.
2. Lack of access to a menu.
3. Locating and navigating to a table while carrying a tray of food.

TRUE or FALSE (Circle one)

Answer: TRUE

**PREVIEW**



## COGNITIVE OR EMOTIONAL – KEY LESSONS

Here are some of the key lessons from Chapter 2: Cognitively or Emotionally Disabilities:

- In assisting customers who have a speech or with a cognitive or emotional disability, it is important to remember that transactions may take longer than usual for various reasons.
- If a person has an emotional disability, the employee's tone of voice and body language can escalate a person's anxiety level and cause undue stress. Speaking slowly and quietly can often diffuse these situations.
- In transactions with a customer with a cognitive or emotional disability, always address the customer with disability first. If the customer has a companion, they may want to involve that person in the transaction or conversation.
- In interacting with customers with cognitive or emotional disabilities, the most important thing is to speak to them as you would speak to any other customer and to put them at ease to ask for help if they need it.
- Some customers are non-verbal. People can use electronic devices, sign language, and other means to communicate without actually saying a word.
- Regardless of how the person can communicate, they will always appreciate being talked to, not talked at.

- Keep in mind that people with cognitive disabilities can be easily influenced and dealing with them is not the time to make a hard sell.
- If they are purchasing an item of clothing, such as a shirt or sweatshirt, keep in mind clothing sizes are not all uniform. Explaining the sizing may be very helpful, such as “this runs big or small.”
- At a restaurant, try to accommodate those who request a booth in a quiet area or away from the speakers or television. Some people - especially those on the autism spectrum – are unable to filter out any type of sensory input and would not be able to eat a meal while loud music is playing.
- If someone looks very frustrated or confused over a bill, or is taking a very long time to figure out a price, ask them if they would like some help. One thing that confuses many, is figuring out tips. Be honest about tipping practices in your area.
- If a customer is very upset and angry and you do not know why, speak in a calm, respectful voice and do not interrupt the person. Repeat back what you do understand.
- Recognize that even though you may not know what an upset customer is emotional about, their emotions are very real to them and can be intense and distressing. Ask them if they would like to sit down someplace quiet, or have a glass of water.
- Try to see if they have a medical bracelet on and read it. For example, diabetes can cause some people to have odd behaviors due to low blood sugar. Many times, what they need is a snack to stabilize. If they have an emergency contact listed, call the contact and explain the situation.

- If someone has a seizure in your establishment, the most important thing to do is not to panic. If the person is traveling with a companion, ask that person what to do and follow that lead. Clear the area of people, bring a blanket or a few coats for padding underneath the person and try to avoid asking unnecessary questions. If the person is alone, check to see if they have a medical bracelet. If they do and epilepsy is listed, it will probably tell you what to do such as call 911 after 4 minutes. Do not put anything into the seizing persons mouth. It is very dangerous.

**PREVENTION**