

TRAINING LEADER'S GUIDE

**YOU'VE
GOT
CUSTOMERS!**

And They Want Action

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INTRODUCTION



Saying is one thing and doing is another.

- Montaigne, *Essays*

“**You’ve Got Customers**” video training program is based on the premise that good customer service requires organizations to deliver what they promise. The purpose of the training session is to demonstrate how to put that fundamental idea into practice using six essential techniques of customer service.

HOW TO USE THIS GUIDE



Before beginning your “**You’ve Got Customers**” workshop, read through this guide. Take special note of the Preparing for the Workshop section. The Planning Considerations and Suggested Training Sessions will help you determine your workshop agenda.

Please note that you may present the material on flip charts, overheads or a combination of both. The worksheets, Session Evaluation Form, and flip chart / overhead layouts may be duplicated for use only in training sessions with the program. No other section of the guide may be duplicated.

THE VIDEO’S MESSAGE

THEY WANT ACTION!

In spite of all the attention given to customer service, it seems to be getting worse. What’s the problem?

There has been an over-emphasis on the superficial—the greeter at the door, the forced smile, and the gratuitous “have a nice day.” Certainly, a pleasant manner is important, but all too often meaningful service is lost while superficial friendliness masks the problem.

Delivering exceptional customer service requires action—meeting customer needs, knowing your product or service, following through and solving problems.

You’ve Got Customers follows the trials of a young waiter in his first customer service job. There he learns from a most unlikely team of teachers—a bowling team. From them, he learns six key customer service techniques that could be used in any business, anywhere.

By the end of this engaging story, viewers will understand that “Good service isn’t about flowery words and pleasant smiles. It’s about actions. It’s about going to bat for the customer, even if they do wear bowling shirts.”

KEY TRAINING POINTS



Using these six techniques will help organizations provide more effective service.

- Be honest.
Customers just want to hear the truth.
- Listen before you sell.
Find out what customers want first.
- Follow through on customer requests.
Double check and deliver only what customers ask for.
- Take initiative to solve problems.
Offer solutions, not excuses.
- Know your product.
If you don't know something, find out.
- Take advantage of sales opportunities.
Both you and your customer will benefit.

TRAINING APPLICATIONS



This program easily adapts to **CUSTOMER SERVICE WORKSHOPS** for:

- **ALL CUSTOMER SERVICE PROVIDERS**

Every organization has customers. Serving them well is the key to success. This video and workshop will be valuable for any customer service provider, from new trainees to the most experienced.

PLANNING CONSIDERATIONS



1. **Know Your Audience**
 - Understand the training needs of your audience and target your workshop accordingly.
2. **Determine Objectives**
 - Considering your audience and the materials you will be using, decide on the objectives of your workshop.
3. **View Video**
 - Watch the program. Note situations which relate directly to your audience.
4. **Prepare Environment**
 - Reserve a comfortable room with easy access for viewing the video and for small and large group discussions.
5. **Prepare Materials**
 - Use the Training Leader's Checklist to prepare flip charts and/or overheads and photocopy all participant handouts.
6. **Check All Presentation Equipment**
 - Test all audio and visual equipment **before** the training session begins. At workshop's beginning, make sure everyone can see and hear the presentation.
7. **Send out Invitations to Participants**
 - A sample letter is provided for your use. (page 6)

SUGGESTED TRAINING SESSIONS



	Activity	Time	Page(s)
<u>1-Hour Session</u>	Welcome / Customer Service Survey	20 minutes	8, 9
	Video Presentation & Discussion	30 minutes	12, 13
	Conclusion / Evaluation	10 minutes	19, 20
<u>2-Hour Session</u>	Welcome / Customer Service Survey	20 minutes	8, 9
	“Have I Got A Story” Discussion & Worksheet	30 minutes	10, 11
	<u>Break</u>	10 minutes	-----
	Video Presentation & Discussion	30 minutes	12, 13
	Action Plan / Worksheet	20 minutes	17, 18
	Conclusion / Evaluation	10 minutes	19, 20
<u>3-Hour Session</u>	Welcome / Customer Service Survey	20 minutes	8, 9
	“Have I Got A Story” Discussion & Worksheet	30 minutes	10, 11
	Video Presentation & Discussion	30 minutes	12, 13
	<u>Break</u>	10 minutes	
	“Service Beyond A Smile” Discussion & Worksheet	40 minutes	14, 15
	“It’s Not My Fault” Discussion	20 minutes	16
	Action Plan / Worksheet	20 minutes	17, 18
	Conclusion / Evaluation	10 minutes	19, 20

(These times are approximate and may vary depending on the size and responsiveness of your audience.)

SAMPLE INVITATION TO WORKSHOP



This letter can be sent to your participants approximately two weeks before the training session. You can customize it to fit your needs.

(Date)

To: (Participant's Name)
From: (Trainer's Name)
Re: *You've Got Customers!*

As a customer service provider within this organization, you have the vital responsibility of representing us to our customers, both internal and external. That responsibility requires more than a pleasant manner and a good attitude. Meaningful service also involves meeting customer needs, knowing our product and service, following through on customer requests and solving problems.

On (insert date) at (insert time), we will hold a training session on customer service, with a focus on action over words. The session will be held at (insert location). The purpose of the session and video is to reinforce techniques for providing meaningful service.

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

Thank you!

TRAINING LEADER'S CHECKLIST



1. Reserve an appropriate location with...

- Comfortable seating
- Easy viewing of visuals
- Good lighting
- Adequate writing surface
- Good acoustics
- Accommodations for participants with disabilities

2. Make sure all equipment is working by...

- Checking the player, monitor, and sound
- Testing the video before showing
- Checking overhead projector and any additional equipment

3. Organize and prepare all materials, including...

- Training Leader's Guide
- Overheads and/or flip charts
- Paper and pencils
- Worksheets photocopied for participants

4. Any additional materials (list below)

- _____
- _____
- _____

“YOU’VE GOT CUSTOMERS” WELCOME & DISCUSSION



- | |
|---|
| <p>Time Required: ● 20 minutes</p> <p>Materials Needed: ● Overhead or Flip Chart #1 & #2
● Customer Service Survey worksheet (page 9)</p> |
|---|

Reveal Flip Chart #1:

“YOU’VE GOT CUSTOMERS!” *And They Want Action*

Welcome:

Introduce yourself and welcome participants. Ask participants to introduce themselves, describe their job responsibilities and the customers they serve.

Read or Paraphrase:

This is a workshop about meaningful customer service. We will be considering what it takes to provide service -- beyond a smile. As we go through the session, please draw on your own experiences as both a customer and a service provider, as well as from those in the video.

Hand Out Customer Service Survey:

Explain that participants will be ranking what they believe to be the qualities of a good customer service provider.

Reveal Flip Chart #2 (CUSTOMER SERVICE SURVEY) and Discuss:

Once participants have completed the survey, tally the results (through a count of raised hands) on Flip Chart or Overhead 2. Discuss results. Have participants explain reasons for their choices.

Read or Paraphrase:

All of the qualities listed are important. However, in recent years, there has been an over-emphasis on the more superficial aspects of customer service, of style over substance. Certainly, a pleasant manner and good attitude are important, but they are not enough. This workshop and the video you will see will focus on the “action” traits which are essential for meaningful customer service.

CUSTOMER SERVICE SURVEY WORKSHEET

Instructions:

From the list of characteristics of a good customer service provider, check the 5 (five) which you believe are the most critical. Then rank those 1 to 5.

_____ **COMPETENT (Knows product or service)**

_____ **HONEST**

_____ **POLITE**

_____ **CHEERFUL**

_____ **GOOD SPEAKER**

_____ **GOOD LISTENER**

_____ **FOLLOWS THROUGH ON REQUESTS**

_____ **TAKES INITIATIVE TO SOLVE PROBLEMS**

_____ **INFORMATIVE** (Gives useful information customer may not have known)

_____ _____ (TRAIT NOT LISTED)

“HAVE I GOT A STORY” EXERCISE & DISCUSSION



Time Required: ● 30 minutes

Materials Needed: ● “Have I Got A Story” Worksheet (page 11)

Read or Paraphrase:

When it comes to customer service, everyone’s got a story. As a customer, you remember the rep who yelled at you when you called to find out why the insurance adjuster was three hours late for his appointment or the bank clerk who had no record of your deposit and didn’t think it was a problem.

As a customer service rep, you remember the customer who yelled at you when he was 3 hours late or the bank customer who insisted the bank lost his money when you have shown him repeatedly that his figures were wrong.

This exercise will give you the opportunity to not only tell your favorite story, but to have others figure out how it could have been handled better.

Hand Out Worksheet & Explain:

Hand out “Have I Got A Story” Worksheet and explain that in Part 1 participants will be able to tell their favorite bad customer service story. Allow participants 5 to 10 minutes to write their stories.

Collect all the stories in a box or hat, and then have each participant pick one, making sure no one gets his or her own story. Instruct participants to complete Part 2 of the Worksheet. Allow no more than 5 minutes to write solutions (more time than they would have in a real situation).

Small Group Discussion:

Organize participants in small groups to discuss the stories and solutions. Have the groups brainstorm to see if they can come up with better solutions.

Large Group Discussion:

Reassemble the large group and discuss the individual and small groups’ answers. Ask participants to share the situations from their groups which they found most interesting or exemplary.

“HAVE I GOT A STORY” WORKSHEET

Instructions Part 1: Briefly describe your worst customer service experience, either as a customer or customer service provider. DO NOT complete Part 2.

Instructions Part 2: Briefly describe how the customer service provider should have handled the problem described above. You will be discussing the problem and solution with a small group.

VIDEO PRESENTATION & DISCUSSION



- Time Required:**
- 40 minutes (including 10-minute break) *or*
 - 30 minutes (without break for 1-hour sessions)
- Materials Needed:**
- Video - “**You’ve Got Customers!**”

(10-minute break for 2-hour training sessions.)

Video Presentation:

You may want to introduce the video by saying, “*You’ve Got Customers* contains some valuable lessons about the importance of action in customer service. Take notes if you wish to.” Play the video.

Ask & Discuss:

- Q:** At the start of the story, what was Michael’s idea of how to deliver good customer service? What was wrong with his idea?
Be polite, be upbeat and smile a lot. He was focusing on style over substance. It’s important to be polite and nice, but it’s not enough.
- Q:** What mistakes did Michael make his first night serving the regulars?
He wasn’t honest - told them food could be prepared quickly when it would take 45 minutes, told them items which he didn’t know about were excellent. Also, he didn’t listen - told them about a low cal special before they expressed any interest in it.
- Q:** How did the bartender make Michael’s job more difficult? What did he learn about customer service in his dealings with her?
She was sloppy about filling orders. He learned that he needed to follow through, to double check everything and to take personal responsibility for filling customer requests. He also learned that he had to be polite to her, but let her know he was paying attention.
- Q:** When the customer complained about the sauce on his halibut, what did Michael do wrong? How did he correct the mistake and what lesson did he learn?
At first he just told the customer he got what was on the menu. After talking to Luigi, he came up with several options for fixing the problem - remaking the halibut or preparing something else. He learned that his job was not to argue with the customer or come up with excuses; he needed to take initiative to solve the problem.

(cont’d on next page)

VIDEO PRESENTATION & DISCUSSION (cont'd)

Q: What did Luigi mean when he said, “If you can’t be a good waiter, at least be a dumb waiter”?

He meant that Michael needed to know his product; if he didn’t know something, it was his responsibility to find out and get back to the customer with the right answer.

Q: Which customer service techniques in the video do you think you or our organization practices consistently?

Answers will vary.

Q: Which of the customer service lessons in the video do you think are most important for you or for our organization to work on?

Answers will vary.

10-minute Break (for 3 - hour training sessions)

“SERVICE BEYOND A SMILE” EXERCISE & DISCUSSION



- | | |
|--------------------------|---|
| Time Required: | ● 40-minutes |
| Materials Needed: | ● Overhead or Flip Chart #3 (page 24)
● “Service Beyond A Smile” Worksheet (page 15) |

Reveal Flip Chart #3 & Read or Paraphrase the Following:

The overall message of the video is that customer service is more than smiles and words. Meaningful customer service requires action. This flip chart lists the six actions illustrated in the video which are essential for meaningful service:

1. Be honest. Customers just want to hear the truth.
2. Listen before you sell. Find out what customers want first.
3. Follow through on customer requests. Double check and deliver only what customers ask for
4. Take initiative to solve problems. Offer solutions, not excuses.
5. Know your product. If you don’t know something, find out.
6. Take advantage of sales opportunities.

You will now have the opportunity to apply these actions to your own positions as customer service providers in this company.

Hand Out Worksheet & Explain:

Hand out the “Service Beyond A Smile” Worksheet. Explain that each person should choose 2 of the six actions to write about. For each one, they should describe either a positive experience in which they successfully used the action or a negative experience in which they neglected to use the action or did the opposite (i.e., a time they were not honest with a customer) and suffered the consequences.

Small Group Discussion:

After approximately 15 minutes, organize participants in groups of 3 to 5 people to discuss their experiences.

Large Group Discussion

Reassemble the large group and discuss the individual and small groups’ experiences. Ask participants to share the experiences from their groups which they found most interesting or exemplary. Try to have at least one experience for each of the six training points.

"SERVICE BEYOND A SMILE" WORKSHEET

Instructions:

The video's six training points - recommended actions for meaningful customer service - are:

- 1. Be honest.
- 2. Listen before you sell.
- 3. Follow through on customer requests.
- 4. Take initiative to solve problems.
- 5. Know your product.
- 6. Take advantage of sales opportunities.

Using your own work experience as a customer service provider, choose 2 of the 6 Training Points to write about. Describe either a positive experience in which you successfully used the action or a negative experience in which you neglected to use the action and suffered the consequences.

Experience 1 - Training Point Illustrated: _____

Experience 2 - Training Point Illustrated: _____

“IT’S NOT MY FAULT” DISCUSSION



- | |
|---|
| <p>Time Required: ● 20 minutes</p> <p>Materials Needed: ● Flip Chart #4 (page 25)
● Flip Chart #5 (page 26)</p> |
|---|

Reveal Flip Chart #4 & Read:

In the video, after Luigi says that Michael may have put the drink order in correctly with the bartender, but it didn't come out that way, the following dialogue ensues:

MICHAEL: “But that’s not my fault.”

LUIGI: “Maybe not. But the customer is only talking to one person. You. To them, you are the business. They want you to make sure it not only goes in right, but that it comes out right.”

Ask & Discuss:

Q: Have you ever had support staff let you down like the bartender in this video? What happened?

Answers will vary.

Q: What are some ways you can deal with difficult support staff?

Answers will vary.

Q: Do you agree or disagree with Luigi’s response to Michael? Why?

Answers will vary.

Reveal Flip Chart #5:

“The buck stops here.”

- Harry S Truman, handwritten sign on his White House desk

Ask & Discuss:

Q: How does that statement relate to your job as a customer service provider?

Answers will vary

ACTION PLAN DISCUSSION



Time Required: ● 20 minutes

Materials Needed: ● Action Plan Worksheet (page 18)

Hand Out & Explain:

Hand out the Action Plan Worksheet and explain that this is the participants' opportunity to rate themselves on providing meaningful customer service and to develop a plan for improvement.

Ask & Discuss:

After participants have completed the worksheet, ask which actions might be the most difficult for them to maintain. Why?

ACTION PLAN WORKSHEET

On a scale of 1 to 5 (5 being the highest), rate yourself on the following customer service techniques:

- _____ Be honest.
- _____ Listen before you sell. Find out what customers want first.
- _____ Follow through on customer requests. Double check and deliver only what customers ask for.
- _____ Take initiative to solve problems. Offer solutions, not excuses.
- _____ Know your product. If you don't know something, find out.
- _____ Take advantage of sales opportunities.
- _____ Additional technique (optional)

Considering those techniques you rated below 3, what actions can you take to become a better customer service provider?

What obstacles exist in your organization that hinder you in providing the best customer service? What can you do to improve the situation?

CONCLUSION / EVALUATION



- Time Required:** ● 10 minutes
- Materials Needed:** ● Flip Chart #6 (page 27)
● Session Evaluation Form (page 20)

Reveal Flip Chart #6:

“Good service isn’t about flowery words and pleasant smiles. It’s about actions!”

Read flip chart and remind participants that meaningful customer service is about actions, as well as words.

Conclusion:

Ask participants for any final questions or comments. Thank your group for their participation, hand out Session Evaluation forms, and ask that they be completed before leaving.

SESSION EVALUATION FORM

Instructions: Please circle the number that best describes your evaluation of the training session:

	Strongly Agree	Agree	Uncertain	Disagree	Strongly Disagree
This program clearly showed the importance of action in customer service.	5	4	3	2	1
This program helped me better understand the specific actions required for good customer service.	5	4	3	2	1
This program provided useful techniques for customer service providers.	5	4	3	2	1
The session was well organized.	5	4	3	2	1

The best part of the program was: _____

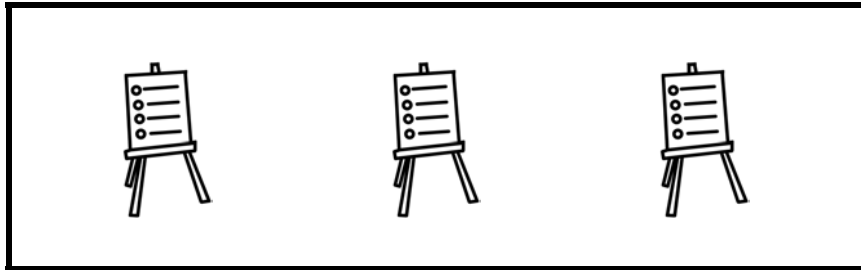
The program could be improved by: _____

Additional comments: _____

FLIP CHART / OVERHEAD SECTION

The following pages may be photocopied onto acetate for overhead projection or used as a guide in creating flip charts.

FLIP CHARTS



OVERHEADS



**YOU'VE
GOT
CUSTOMERS!**
AND THEY WANT ACTION

CUSTOMER SERVICE SURVEY

- _____ **COMPETENT (Knows product or service)**
- _____ **HONEST**
- _____ **POLITE**
- _____ **CHEERFUL**
- _____ **GOOD SPEAKER**
- _____ **GOOD LISTENER**
- _____ **FOLLOWS THROUGH ON REQUESTS**
- _____ **TAKES INITIATIVE TO SOLVE PROBLEMS**
- _____ **INFORMATIVE (Gives useful information customer may not have known)**
- _____ _____ **TRAIT NOT LISTED Optional)**

“SERVICE BEYOND A SMILE”

- 1. Be honest.**
- 2. Listen Before You Sell.**
- 3. Follow Through on Customer Requests**
- 4. Take Initiative to Solve Problems**
- 5. Know Your Product**
- 6. Take Advantage of Sales Opportunities**

Michael:

“But that’s not my fault.”

Luigi:

“Maybe not. But the customer is only talking to one person. You. To them, you are the business. They want you to make sure it not only goes in right, but that it comes out right.”

The buck stops here.

**- HARRY TRUMAN,
handwritten sign on
White House desk**

Good service isn't about
flowery words and pleasant
smiles. It's about actions.

For more information...

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