Call Center Customer Service
Williams-Sonoma

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Trainer's Manual Format

The first page of each unit begins with the objectives, timing, method/media, materials and handouts for that unit.

Trainers can run the program using only the left column, or the left and right columns:

- ♦ A trainer who is experienced with this program can run it by using only the left column. It contains the action steps to be followed (What to Do), and shows when a transparency, flip chart or other material is to be used.
- ♦ A less experienced trainer could run the program by following the right column exactly; an experienced trainer can use the column as a model and/or source for ideas about what to say.

Each paragraph in the right column, unless it is underlined, contains information the trainer is to say or paraphrase. The type of information is indicated by the symbol in the middle column:

■ in the right column indicates that the right column contains a point to be made by the trainer

? in the right column indicates that there is a question to be asked by the trainer.

Underlining in the right column indicates a direction to the trainer, or an action that the trainer is to take -–not something the trainer is to say or paraphrase.

Brackets [ ] indicate information the trainer is to provide, because it changes over time; or a choice of information, based on the type of audience for which the program is being run.

For each individual or group activity, there is an instruction that indicates how much time to allow for the activity. These timings are estimates.

- ■ Adjust the timings as appropriate. If you see that most participants have finished before the allotted time, shorten the activity. If you see that a number of participants have not finished within the allotted time, allow additional time if you are on-schedule with the program; otherwise, explain that you have to move on and ask participants to finish the activity on their own.
- ■ Give participants a signal that time is almost up. When the allotted time is between ten and 20 minutes, give a three-minute signal; when the allotted time is greater than 20 minutes, give and 8-minute signal; when the time is less than ten minutes, give a two-minute signal.

Summary of Program Materials and Handouts

Unit	Materials	PPT Slides	Handouts/Miscellaneous
1	▪ Workbook, pp. 1-9 ▪ Counter bells (Optional/not included) ▪ Flip Chart Paper ▪ Markers ▪ Laptop for PowerPoint ▪ LCD Projector for PowerPoint ▪ PPT (PowerPoint) Family Feud Game on diskette	▪ #1-8	▪ Family Feud Prizes (Optional)
2	▪ **Workbook, pp. 10-15** ▪ **Flip chart paper (2 pads)** ▪ **Markers** ▪	▪ #9 (Title Slide Only)	None
3	▪ Workbook pages 16-23 ▪ PPT slide: How Did We Do ▪ PPT Side: Tone ▪ Laptop ▪ LCD Projector ▪ Audiocassette #1, cut #1 ▪	▪ #10-12	None
4	▪ Flip Chart Paper ▪ Markers ▪ MOTS Audiocassettes: Recorded examples of Greeting, Hold, Transfer, Closing, Informing and Follow-Up/ Follow-Through ▪ 6 audiocassette playback machines ▪ Workbook pages 24-35. ▪ Cube Cards	▪ #13 (Title slide only)	▪ Cube Cards
5	▪ Workbook pages 36-43. ▪ Audiocassette #1; Cuts 2,3,4. ▪ Audiocassette player	▪ #14-17	▪ None
6	▪ Workbook pages 44-52. ▪ Corporate Call Strategies (if available)	▪ #18-19	▪ None
7	▪ Workbook pages 53-59 ▪ Attitude Cards ▪ Attitude Scenario cards ▪ Call Bells (optional)	▪ #20-21	▪ Attitude Cards

Summary of Program Materials and Handouts, Continued

Unit	Materials	PPT Slides	Handouts/Miscellaneous
8	▪ Workbook pages 60-65 ▪ Flip Chart Paper ▪ Markers	▪ #22-24	▪ None
9	▪ Workbook pages 66-74 ▪ Puzzle game ▪ Flip chart paper ▪ Markers	▪ #25-27	▪ Puzzle game cards ▪ Customer cards for puzzle game
10	▪ Workbook pages 75-78. ▪ Flip Chart paper ▪ Markers ▪ Tape for flip chart paper.	▪ #28-29	▪ None
11	▪ Workbook pages 79-85. ▪	▪ #30	▪ None
12	▪ Workbook page 86-88 ▪ SCENARIO CARDS – Must be developed by trainer PRIOR to teaching this segment!!!Flip Chart ▪ Markers	▪ #31	▪ Scenario Cards
13	▪ Jeopardy Game ▪ LCD Projector ▪ NO work book ▪ Flip charts and markers for score keeping.	JEOPARDY COMPUTER DISKETTE GAME	▪ Prizes (optional)

Summary of Unit Run Times

Unit #	Unit Name	Run Time	Time of Day
1	What Customers Want	1 hour; 25 minutes	NA
2	Your New Role	1 hour; 05 minutes	NA
3	Moments of Truth	1 hour, 30 minutes	NA
4	Making the Moments of Truth Real	1 hour; 05 minutes	NA
5	Focused Listening Skills	30 minutes	NA
6	Call Strategies	1 hour; 20 minutes	NA
7	Managing Difficult Callers	25 minutes	NA
8	Delivering Bad News to a Customer	30 minutes	NA
9	Strategic Questioning	1 hour; 35 minutes	NA
10	Informing	1 hour; 15 minutes	NA
11	Product Knowledge for Cross-Selling and Upselling	20 minutes	NA
12	How to Say it Without Sounding Like a Telemarketer	20 minutes	NA
13	REVIEW SESSION	20 minutes	NA
TOTAL		**11 hours, 50 minutes.**	

Unit #1: What Customers Want

Objectives: After completing Unit 1, participants will be able to:

- List the six main customer wants from any customer telephone interaction.
- Demonstrate specific ways they can satisfy each customer want.

Timing: **1 hour; 25 minutes**

Method / Media: Trainer lecture, group activity, discussion, phone work.

Materials: Workbook pages **1-9.**
Laptop computer
Family Feud diskette
LCD projector
Family Feud Prizes
Bells for Family Feud Game
Flip Chart paper
Markers
PPT # 1-8

What to Do	What to Say

Introduce Unit
(1 minute)

- Welcome participants to the training.

Set goal expectations of
Entire training program:
Increase application.
(10 minutes to set expectations and provide game instructions)

What to Do	What to Say
	▪ <u>Explain goal of the entire training program, which is to get participants to improve performance by 1% through increased APPLICATION of concepts</u>
KNOW/DO Model	▪ <u>Demonstrate "The One Percent Difference" via the "Know vs. Do" Productivity Model.</u>
Tiger Woods 1/10% difference!	▪ <u>Demonstrate the difference 1% improvement can make via Tiger Woods example.</u>
Purpose of Module 1	▪ <u>Explain purpose of module, which is to understand what customers want and demonstrate behaviors and use phrases that satisfy those customer wants.</u>
	■ Say: Before you can provide quality customer service, you have to know what, exactly, your customers want
Transition to Family Feud Game	■ According to TARP – an industry organization that sets standards for call centers, customers have six basic wants. These wants were uncovered through a survey of over 2,000 call center customers. ▪ To find out what those needs are, let's play a game of FAMILY FEUD

What to Do	What to Say

Family Feud Game
(10 minutes)

- Divide participants into two groups
- Explain Game Rules: The top six customer wants are on the PowerPoint screen—hidden behind each link. In a moment, I will say, "Give me a customer want." The first group to ring the bell and give me an answer that is up here gets five points per correct answer. If your answer is incorrect, we simply start again—and the team who rings their bell first gets to answer.
- Hand out bells to each group
- Begin game. Continue until all six wants have been uncovered.
- Briefly describe what is meant by each of the six wants. (This is on the PPT slides)

1. Zeal
2. Accountability
3. Knowledge
4. Save Time
5. Courtesy
6. Problem Solver.

- After the game, have participants write the list in their workbooks on page 3. Discuss the importance of ZEAL and how the entire William-Sonoma call center training program is based on inreasing ZEAL!

Small Group Activity:
Meeting the Wants
(10 minutes)

- Break participants into three groups
- Assign two Customer Wants to each group.

What to Do	What to Say

- Give directions for activity: In your groups, you are to write ***specific*** things you can **say**, and ***specific*** things you can **do** to meet your customer wants. For example, if your customer want is "Save Time," something you could say is a phrase such as "right away." Don't just write in your book, "do things faster for the customer." We're looking for very specific words and actions. Something you could do is to let the customer know how long they will be on hold.
- Explain time of activity: You'll have ten minutes to complete your lists in your groups.

Debrief Activity (10 minutes)

- As each group is giving their list, have the other participants write their answers in the workbook page that corresponds to the customer want. (Pages 4-9 in workbook).
- As a bare minimum, lists should include the following:

SAVE TIME WANT:
- Use phrases such as "right away."
- Let the customer know how long they will be on hold.
- Answer the call by the second ring.

ACCOUNTABILITY WANT
- Use phrases such as, "I will take care of this."
- Set expectations for exactly what you will do and when you will do it.
- Set a specific follow-up time, if necessary.
- Set delivery expectations

What to Do	What to Say

KNOWLEDGE WANT
- Have a thorough understanding of your products and services. Use phrases such as, "What I've found," "This product offers the specific features of….,"

- If you don't know the answer, let the customer know that you know where to find the answer, and when you will get back to them.
- Eliminate UM and AH from your vocabulary.
- Use a confident tone
- Use confidence words.

COURTESY NEED

- Use "please" and "thank you."
- Thank the customer whenever they give you info that you request.
- Use the phrase, "I'd be happy to…"
- Use the phrase, "How may I help you."

ZEAL NEED

- Use action words
- Use an upbeat tone
- Let the customer know you are glad they called by using phrases such as "I'd be happy to help you with that!," "It would be my pleasure." Or "Let's go shopping!!"
- Go above and beyond what the customer would expect
- Don't escalate calls. When you escalate, you inadvertently tell the customer, "I don't want to bother with you."

What to Do	What to Say
	PROBLEM-SOLVER NEED (This also speaks to ZEAL need). ♦ Be proactive in solving customer concerns ♦ Identify customer problems before the customer even knows they may be problems. ♦ Anticipate customer needs. ♦ Don't escalate calls!!!
Go to the Phones (20-30 minutes)	♦ Instruct participants to go to the phones and take at least three calls where they focus on satisfying the customer wants with the actions and phrases they learned in this unit.
Debrief Calls: **(15 minutes)**	▪ Ask participants what went well with their calls. Solicit responses. ▪ Ask participants how customers responded when the associates used the phrases and actions that focused on meeting the customer needs. ▪ Solicit specific responses on improving ZEAL attitudes in associates.

Unit #2: Your New Role At Williams-Sonoma

Objectives:

After completing Unit 2, participants will be able to:

- Clearly articulate their new three-pronged role as a Williams-Sonoma associate
- List specific actions they can take to carry out each of the three parts to their new role
- Explain how each part of the new role meets customer desires.

Timing:

1 hour, 45 minutes

Method / Media:

Trainer lecture, group activity, discussion. phone work.

Materials:

Workbook pages **10-15.**
Flip Charts
Markers
PPT #9

What to Do	What to Say

Introduce Unit II
(1 minute)

- <u>Give unit objectives.</u>
- <u>Explain purpose of module, which is to understand associates new role at Williams-Sonoma.</u>

What to Do	What to Say

Introduce new 3-pronged role (2 minutes)

- Have participants fill in the blanks on workbook page 11.
- SAY: Your three-pronged role as a Williams -Sonoma PERSONAL SHOPPER is to:
  differentiate Williams-Sonoma service by providing a unique shopping experience,
  reinforce Williams-Sonoma product quality and
  Improve the **profitability per transaction.**

Briefly explain each new Role. (8 minutes)

[FACILITATOR NOTE: Do NOT go into discussions of HOW to achieve each role; only DEFINE each role at this point.]

?: What do you think we mean by "differentiate" Williams-Sonoma service?

- Solicit responses, being sure to facilitate to the following responses:
  (1) Show that we're personal shopping consultants
  (2) Show that we're not just order takers

?: Why is it important to "reinforce Williams-Sonoma product quality?"

- Solicit responses, facilitating to the following responses:
  (1) To make the customer feel good about purchasing Williams-Sonoma products

What to Do	What to Say

  (2) To make the customer feel special that they own our products.

(3) To enhance the image of our products.

?: What do you think is the image of our products and services?

Solicit responses.

?: Why do you think people buy our products, since they are more expensive than others?

[FACILITATOR NOTE: Key learning point here is to establish that people buy our products because they ARE high quality, and project a certain image that people want to display in their homes.]

?: What do you think we mean when we say one of your new roles is to improve the profitability per transaction?

- Solicit responses.

Small Group Activity: How I Can Achieve the New Roles
(15 minutes)

- Count participants off by three's.
- Give each group one piece of flip chart paper and a marker
- Assign one of the three parts of the new role to each group.

What to Do	What to Say

- Explain Activity: Now we're going to take ten minutes and discover ways that we can each carry out the parts of our new role.

Each group has a piece of flip chart paper with one part of the new role.

In your groups, I would like you to write down what you PERSONALLY can do to meet your assigned part of the role. Do NOT write down how Williams-Sonoma as a company meets the role. For example, if your assigned role is to "Reinforce product quality" one thing you could do is use phrases such as "lush" and "velvety" to describe products. Be creative with these. Think of as many things as you can in the next ten minutes. The group with the most ways to carry out the role on their list wins a prize. Brainstorm. Anything goes. Think out of the box on this one!

Exercise Debrief (30 minutes)

- Have each group give items on their list.
- Highlight the BEST items from each list, and have participants write these BEST items on the corresponding workbook page (pages 12-14).
- Be sure that at a minimum each role includes the following:

DIFFERENTIATE WS Service:

- Use phrases such as "Let's go shopping."
- Exceed expectations on every interaction. (Give examples of types of expectations to exceed)

What to Do	What to Say

- Use words and phrases that get the customer's emotions involved. ("Step up to the checkout lane. There's no waiting here!")
- MAKE IT FUN TO SHOP VIA CATALOG AT WILLIAMS-SONOMA!!!!!!!!! (You may want to do an activity just to solicit ways to make the shopping experience FUN.)

REINFORCE WILLIAMS-SONOMA PRODUCT QUALITY

- Use words to describe the high-quality of the product—especially words appealing o emotions, since people buy with emotions.
- DO NOT GIVE FREEBIES SUCH AS GIFT CERTIFICATES. (Explain that when you give a discount, you dilute the value of the product. Give participants phrases to use to avoid giveaways, such as, "We want to make sure you get a quality product that you are happy with so that you can enjoy it for a long time in your home. We don't want to just throw money at you so you'll be quiet and go away." Solicit other examples from the group. Get the group to come up with alternative phrases.)
- Use words like "elegant, high-end, high-quality, sophisticated."

IMPROVE THE PROFITABILITY PER TRANSACTION

- CROSS SELL AND UPSELL!!!!! (This is the main one. IF this is all they come up with, that would be sufficient.)
- Do not offer giveaways.
- Think ahead to identify ways to save shipping costs.

What to Do	**What to Say**
Preparing for the Phones (5 minutes)	SAY: As you prepare to go to the phones and implement what you've learned in this unit, turn to page 15 in your workbook. There you will find a place to write one specific thing you will do or say on the next three calls to differentiate, reinforce value and improve profitability. Take three minutes and fill out the page.
Go to the Phones (30 minutes)	▪ Instruct participants to go to the phones and take three calls utilizing the concepts learned in this module. ▪ While participants are on the phones, facilitator should monitor calls to capture good examples of differentiation, reinforcing value and improving profitability for the debrief discussion.
Phone debrief (15 minutes)	**?:** Who wants to tell me what they did to DIFFERENTIATE our SERVICE QUALITY? ▪ Solicit responses, asking how the customer responded and what they would do differently, if anything, next time. **?:** Who wants to tell us what they said or did to reinforce the PRODUCT QUALITY? ▪ Solicit responses.

What to Do	What to Say
	?: Who has examples of what they said or did to IMPROVE THE PROFITABILITY of the transaction? ▪ <u>Solicit responses.</u>
Reinforce learning point of Unit	
	SAY: To establish our company as a world-class customer service company, it's important that we DIFFERENTIATE our customer service because customers recognize and appreciate service that "stands out" and is different from the rest of the pack. It's important that we REINFORCE OUR PRODUCT QUALITY because our customers are shopping at Williams-Sonoma and its subsidiaries because they are looking for high-quality, high-image products to display in their homes. Finally, it's important to IMPROVE THE PROFITABILITY OF EVERY TRANSACTION because by doing so we not only increase income, but we increase the perceived value of our company in our customer's eyes.

Unit #3: Moments of Truth

Objectives:

After completing Unit 2, participants will be able to:

- Define Moments of Truth
- Identify the Moments of Truth for their call center customers
- Calculate their own personal Moments of Truth
- Define WOW service
- Set and manage expectations effectively
- Understand what an appropriate tone of voice is for customer service scenarios.

Timing: **1 hour; 30 minutes**

Method / Media: Trainer lecture, group activity, discussion. phone work.

Materials:

Workbook pages **10-17.**
Calculator
PowerPoint Slide (Tone)
Sticky Notes
PPT # 10-12

What to Do	What to Say
Introduce Unit II (1 minute)	▪ Give unit objectives. ▪ Explain purpose of module, which is to understand how customers make their service impressions.

What to Do	What to Say

Define Moments of Truth
(One minute)

■ Moments of Truth are any experiences the customer has with our company or our employees.

■ A customer's perception of how good our customer service is is based on a composite feeling that results from each Moment of Truth he or she has experienced.

"Counting the MOT's" Exercise (5 minutes)

■ Let's develop a list of the Moments of Truth for our customers.

■ <u>Solicit a volunteer to act as the customer</u>

■ <u>Ask the other participants to form a circle around the customer</u>

■ <u>Hand out sticky notes pads to each participant.</u>

■ <u>Explain Exercise:</u> For each Moment of Truth that we identify, I would like you to place a sticky note onto the customer. There's no need to write down what the MOT is, just place a sticky note on the customer.

■ OK, let's begin.

■ **?:** When a customer calls into our center, what is the first thing he or she experiences? (Answer: the phone ringing.) <u>Have participant who said, "phone rings" place a sticky note on the customer.</u>

■ **?:** After the number of rings, what is the next thing a customer experiences? (Answer: Greeting.) <u>(Have participant who said "greeting" or "answer the phone" place a sticky note onto customer to represent the greeting.)</u>

What to Do	What to Say

- ? After the greeting, what is the next thing a customer experiences?

- For each Moment of Truth that the participants give, write it down on a flip chart paper.

[Continue with this line of questioning until you have list that looks something like the following:]

1. Number of rings
2. Greeting
3. Getting put on hold
4. Getting transferred
5. Closing the call
6. Solving the customer's problem
7. **Giving the customer information.**

- Write this list in your workbook on page 17.

Transition to Calculating Moments Of Truth
(5 minutes)

- Now let's find out how much you, personally, impact a customer's perception and customer satisfaction.

What to Do	What to Say

Calculating Personal MOTS

- <u>Have participants fill out workbook page to calculate MOTS (p.18)</u>
- <u>NOTE:</u> New hires may need help with the number of calls taken per day.
- <u>Reinforce learning point, which is that the individual reps have a lot of control over customer satisfaction.</u>

Define WOW Service (2 minutes)

- <u>Have participants fill in the blanks in workbook page 19:</u> **WOW Service** means **exceeding** the **expectations** of the customer on every interaction.
- How do we provide WOW service? Primarily by setting and managing customer expectations appropriately.
  - Did you know that customers don't get angry with the FACT that they are put on hold? According to a recent study by TARP, what angers customers most is not knowing WHY they have to be put on hold, and not knowing HOW LONG they will have to wait.
  - When setting expectations, be sure to have it quantifiable. Don't just say, "I'll get back to you in a second." Say, "That will take me about 2 minutes to look up. Would you like to hold while I do that?"

Discuss Setting and Managing Expectations (one minute)

- <u>Go through list in workbook on page 20.</u>

What to Do	What to Say

LARGE GROUP DISCUSSION:
Setting Expectations
(5 minutes)

?: What are some opportunities we have to manage expectations ?

A:
(1) Letting the customer know how long they will be on hold
(2)Setting delivery expectations
(3) Letting the customer know what the next steps will be
(4) Other

Discuss Exceeding Expectations
(one minute)

♦ <u>Go through workbook page 21.</u>

EXERCISE: How Are We Doing?
(10 minutes)

- <u>Place sticky notes with "EXCELLENT, VERY GOOD, GOOD, FAIR, POOR" around the room.</u>

- We recently had a private, outside consulting source poll a sampling of our customers to find out how we're doing in the area of meeting customer expectations.

- You may remember from Unit One that the six things customers expect from a call center associate are:

(1) Timely service
(2) Accountability
(3) Knowledge
(4) Courtesy and Caring
(5) Problem Solver
(6) Zeal

Those are the areas that were polled.

What to Do	What to Say

Let's see how well we did.

PowerPoint Slide:
How We Did

- Show PPT slide indicating the categories.
- As you read each category, ask participants to go stand next to the sticky note (EXCELLENT, VERY GOOD, GOOD, FAIR, POOR) that indicates how well PARTICIPANTS think they do in each category (NOT how well they think CUSTOMERS think they do.)
- Calculate the percentage of participants in only the EXCELLENT and VERY GOOD categories. (Since excellent and very good would indicate EXCEEDING expectations. "GOOD" only meets expectations.)
- Unveil what percentage of customers fell into the combined VERY GOOD and EXCELLENT categories.
- Discuss any potential reasons for differences in service perceptions between participants and customers.

Transition to TONE OF VOICE (5 minutes)

SAY: There are several ways to meet and exceed expecations. We've already talked about some specific phrases we can use and specific actions we can take. But there's one thing that conveys more than anything else a desire to serve –a real zeal – and a caring attitude.

What to Do	What to Say

PPT slide: Tone

UCLA Professor Albert Mehrabian did a study to find out how to avoid missed and mixed messages in communications. He found in face-to-face communications, 55% of our total communicated message comes from our body language; 38% from our tone of voice and 7% from the words we say. In telephone conversations, where we don't have the benefit of body language, 78% of our message comes from out tone and 22% from our words.

- Have participants fill in the numbers from the study in workbook page 22.

Play audio tape with tone Examples (5 minutes)

- SAY: To demonstrate how varying the tone while using the same words can have a great impact, I'm going to play some audio cuts. IN the first scenario, the WORDS are exactly the same, but the tone is different.
- As I play each audio cut, write down in your workbooks on page 23 what it is you think the customer service representative is saying with her tone.
- Play tape cut #1. (The announcer says the same phrase three different ways.)
- Instruct participants to write in workbook page 23 what message they think the person's tone is sending in each example.

What to Do	What to Say
	■ <u>Debrief by discussing why each tone portrayed certain types of feelings and emotions.</u>
Go to the phones (30 minutes)	■ Participants go to the phones to take 1-2 calls focusing on setting and managing expectations, and using a pleasing tone.
Debrief (15 minutes)	▪ <u>Ask participants what went well, and what they will do differently in the future to set and manage expectations appropriately.</u>

Unit #4: Making the Moments of Truth Real

Objectives: After completing Unit 4, participants will be able to:

- Give a "Best of Class" Greeting
- Transfer customers appropriately
- Place customers on hold appropriately
- Close a call effectively
- Use follow-up procedures.

Timing: **1 hour; 45 minutes**

Method / Media: Trainer lecture, group activity, discussion. phone work.

Materials:
Workbook pages **24-35**
6 audio playback cassettes
MOT audiocassettes**.**
Cube Cards
Flip Chart Paper
Markers
PPT # 13

What to Do	What to Say
Introduce Unit IV (1 minute)	▪ Give unit objectives. ■ Explain purpose of module, which is to develop and use "Best of Class WOW" standards for each of the main call events (Greeting, Hold, Transfer, Informing, Closing.)

What to Do	What to Say
	■ Explain that one hallmark of world class customer service organizations is consistency. The Standards provide a way for your company – and each associate—to provide consistent service.
Brief Review of Moments of Truth (2 minutes)	SAY: In our last unit, we talked about Moments of Truth, and we said that some Moments of Truth that our customers experience are: 1. The greeting 2. Getting put on hold 3. Getting transferred 4. Informing 5. Ending the call 6. Follow-up and follow-through We already have procedures for answering the phone, transferring a customer, etc. But now we want to take those procedures and transform them into WOW experiences for the customer.
Further Defining WOW (3 minutes)	**?:** What does providing a WOW experience mean for the customer? **A:** Exceeding expectations on every interaction. Delighting the customer on every interaction. **?:** What are the criteria we use to determine whether we are delighting a customer? **A:** The six customer wants.

What to Do	What to Say

?: Who remembers what the six customer wants are?

A:

(1) Timeliness
(2) Knowledgeable Associate
(3) Associate who is accountable
(4) Associate who is a problem solver and doesn't escalate
(5) Caring / Courtesy
(6) Zeal.

Transition to Audiocassette Exercise (5 minutes)

- SAY: Before we can get to "WOW" we have to look at where we are NOW!
- Divide participants into six groups
- Hand out audio playback machine to each group.
- Assign one MOT (Greeting, Connecting, Hold, Informing, Closing) to each group.
- Give each group the audiocassette that corresponds to their MOT.
- Give directions for activity:

SAY: Each group has an audiocassette containing one portion of one call that corresponds to the MOT you are evaluating.

In your groups, you are to:
(1) Listen to the tape
(2) Fill out the corresponding workbook page (pages 25-29)
(3) Be prepared to present your findings to the class.

Where We're At EXERCISE (15 minutes)

You will have 15 minutes to complete the exercise.

What to Do	What to Say

Debrief Exercise:

- Have each group play their audio tape recording

- <u>While the tape is playing, have the other groups jot down a one-through-ten ranking in their workbooks on the page that corresponds to the MOT they are evaluating.</u>
- <u>Have the group who is presenting tell the class what their findings were.</u>
- <u>Discuss any differences in rankings.</u>
- <u>Facilitate to the point that it should be abundantly clear that the call is a WOW…otherwise, if there's any doubt, it could be improved.</u>
- <u>Solicit responses for improvement from the group.</u>
- <u>Repeat this procedure with all the MOTS and all the groups.</u>

Transition to Group Exercise
(1 minute)

- Now let's find out how we can get to WOW *consistently* from where we are now.

What to Do	What to Say

Begin Group Exercise
(15 minutes total)

- <u>Divide class into five groups</u>
- <u>Assign one MOT from above to each group</u>
- <u>Give each group one piece of flipchart paper and markers.</u>

- <u>Have participants draw a vertical line down the center of the flip chart page.</u>
- <u>Have participants write "NOW" at the top of the left hand side of the page and "WOW" at the top of the right hand side of the page.</u>

- <u>Instruct each group to write the specific, step-by-step processes that they currently go through for their Moment of Truth on the left hand side of the paper. Then, on the right-hand side, have them write suggestions as to how they would improve the process to make it a WOW experience.</u>

- [For example, ask them to write the steps they currently go through in answering a call and greeting a customer on the left hand side of the paper. One the right hand side, have them write what they would do differently to make it a WOW experience.]

What to Do	**What to Say**

- (FACILITATOR NOTE: You may want to refer the participants back to the customer wants from Unit One to help give them ideas of how to make the experience a WOW: *Timeliness, Courtesy, Zeal, Accountability, Knowledge and Problem Solver.*)

- <u>Instruct participants to "get out of the box" and be creative. Tell them anything goes. (They can even be a little silly. During the debrief you can eliminate inappropriate responses.)</u>

- <u>Instruct participants to use workbook pages 30-35 for their activity.</u>

- Give participants 10 minutes to finish their lists.

Debrief Group Activity (10 minutes)

- Have each group present their WOW steps to the large group.
- Ask the other groups to add or subtract to the list.
- Facilitate the discussion toward the steps on the cube cards. (DO NOT HAND OUT CUBE CARDS YET!!!)
- Explain how each component, or each step of the standards relates back to a customer wants from Unit I.

Go to the phones (30 minutes)

- Instruct participants to go to the phones and implement the WOW standards for each MOT.

What to Do	What to Say

- [Participants should each take 2-3 calls.]
- [Facilitator should monitor calls and take notes on observations. Be sure to include examples of WOW that you observed. Also, indicate areas for improvement.]

Debrief (15 minutes)

- Solicit feedback from the group
- **?** How did it go?
- **?** What reaction did you get from customers?
- **?** Was it easier to process the call using the WOW standards? How? If not, why not?
- Give feedback from your monitoring observations.
- Suggest ways to improve.

Hand out cube cards (2 minutes)

Here's a handy reference guide for you to use while on the phone. Place this in your cube to use when on calls.

Unit #5: Focused Listening Skills

Objectives:

After completing Unit 5, participants will be able to:

- Identify customer concerns
- Identify key words and phrases
- Overcome listening distractions
- Use active listening
- Clarify and verify for information
- Use verbal cues to show they are listening.

Timing:

1 hour; 20 minutes

Method / Media:

Trainer lecture, group activity, discussion. phone work.

Materials:

Workbook pages **36-43.**
Audio cassette #1/ cuts 2,3,4**.**
Audiocassette player
PPT # 14-17

What to Do	What to Say

Introduce Unit V
(1 minute)

- Give unit objectives.
- Explain purpose of module, which is to develop better listening skills in order to identify the real customer concerns and solve problems more quickly.

Play audio cut #2 from Audiocassette #1. [NOTE: Cut #2 is already cued up. It is Immediately after cut #1.]

What to Do	What to Say

Audiocassette Exercise (1 minute)

SAY: I'm going to play an audiocassette snippet now. The directions are on the tape. Please write your answers in your workbook on page 37.

Debrief Exercise (2 minutes)

[Cut #1: They should have written their name at the top of the page. They should NOT have printed it, nor should they have written it on line one. The learning point is that sometimes we don't listen and we just do things out of habit.

Cut#2: We don't know the answer. It wasn't given. The learning point is that sometimes we make an assumption based on experience. (For example: "Babies always run to mama.)

Cut #3: The answer is your age. The learning point is that we need to listen from the very FIRST word a customer says, since sometimes that includes the clue to the answer.

Cut #4: Monday, Wednesday and Friday. The learning point is sometimes environmental distractions prevent us from listening.

Cut #5: You don't bury survivors. The learning point is that you have to listen until the very LAST word, since sometimes that last word is your clue to the answer.]

What to Do	What to Say

Steps to Focused Listening (1 minute)

- <u>Read through workbook page 38.</u>

Identifying Key Words and Phrases (5 min)

- **[**This is an area where you will do your own impromptu customization as needed. We have included some phrases customers say, but you can add, delete or replace these as your customer conditions change.]
- On the left side of workbook page 39, instruct participants to write some common phrases customers use when they call in with problems. For example, a customer may say, "I didn't get my couch." This would indicate a potential problem with furniture.
  - **SAY:** These become the key words and phrases that you should especially listen for when you're on the phone with customers.

Caller Attitudes as a Listening Distraction

- SAY: Sometimes it's the caller attitudes that are the problem.
- Listen to the next five statements on the audiocassette, and in your workbooks on page 40, write what attitude you THINK the customer is portraying based on his tone.

Play audiocassette cut #3
[Already cued to come immediately after cut #2]

What to Do	What to Say

Debrief Audio Exercise (2 min)

- #1 :Mildly upset
  #2: Surprised
  #3: Seething anger (sound as if he has his teeth clenched)
  #4: Irate
  #5: Matter-of-fact. Emotionally controlled.]

- **?:** What was it about the tone in each example that made you identify what emotion they were feeling?

- Solicit responses.

- **? :**What happens when you get people with these emotions?

- **A:** Sometimes you want to shut down and not listen.

- We'll talk about what to do when you get an irate customer on the line in the next unit. For this unit, we just wanted you to be sure to listen to the customer's tone as well as his or her words, since 78% of their message is communicated through tone.

What to Clarify and Verify And How to do it. (2 minutes)

Have participants fill in the blanks on page 41 of their workbook.
Verify facts, figures and caller data.
Clarify emotions or attitude statements made by the caller.

What to Do	What to Say

How do you verify?

- Verify by restating back to the customer the information as they gave it to you.
- Clarify by asking questions to ensure that you understood the caller correctly.

Using Verbal Cues to Show You Are Listening(2 minutes)

- Have participants read through page 42 of the workbook.

Debrief Reading

- **[**Since the workbook page is pretty self-explanatory, just ask what questions the participants have on using verbal cues.**]**

Types of Distractions (3 min)

- Discuss the types of distractions listed on page 43 of the workbook.

Audiocassette cut #4 [already cued.] 5 minutes.

- Play audiocassette cut #4, which has examples of several different types of distractions. After each vignette, stop the tape and ask participants what type of distraction they thought it was, and how they would manage the distraction.
- NOTE: On the first cut, there is intentional drop-out on the tape to simulate a poor phone connection.

How to overcome Listening distractions (5 minutes)

- **SAY:** When trying to overcome and manage listening distractions, you have four choices:

1. **Eliminate the distraction.** IF you can, get rid of it. Tell the person talking to you while you're on the phone to go away. Change the thermostat. Adjust the lighting.

What to Do	What to Say

2. **Concentrate through the distraction.** Sometimes you can't eliminate the distraction, you have to just really FOCUS and try to block out everything else.

3. **Redirect the caller.** If the caller is the distraction by getting off track or being overly emotional, simply redirect them back to the business issue at hand by asking closed-ended questions that will give you the information you need to solve the problem.

4. **Thought-Stopping**. This one is used primarily with biases and prejudices against certain types of callers. When you get a caller type of the phone that you dread and those little voices in your head start to say, "Oh, no! It's one of THOSE callers," simply say to yourself, "Stop it! This caller may be different." Granted, it may take you several times telling yourself this until you are able to listen completely to the caller. But it has worked wonders in many call center agents.

Go to the phones (30 minutes)

- Send participants to the phones to take two to three calls, focusing only on improving their listening skills, using verbal cues, identifying caller attitudes and identifying key words and phrases.

Debrief (10 minutes)

- Solicit participant responses on what specific listening techniques they implemented and found helpful on the calls.

Unit #6: Call Strategies

Objectives:

After completing Unit 6, participants will be able to:

- Define call strategies
- Differentiate between a call strategy and a call objective
- Articulate four benefits of a call strategy

- Know the call strategies for the most frequently received calls in your call center.

Timing: **1 hour; 20 minutes**

Method / Media: Trainer lecture, group activity, discussion. phone work.

Materials: Workbook pages 44-52.
Corporate Call Strategies (if available)
PPT # 18-19

What to Do	What to Say

Introduce Unit V
(1 minute)

- Give unit objectives.
- Explain purpose of module, which is to develop and understand your company's various call strategies for each call type.

Define call strategy,
Call objective and
Call progression
(2 minutes)

- Have participants read through definitions on workbook page 45.

What to Do	What to Say

Benefits of a Call Strategy (5 minutes)

- Call Strategies provide four unique benefits:
  (1) They provide focus and direction for the call
  (2) They allow you to control the call
  (3) They make your calls more efficient
  (4) They contribute to the customer's perception of receiving excellent advice/service.

  ?: How do call strategies provide focus and direction for calls?
  A: They give you a mental roadmap for your calls so you know at all times where you are headed in the call. This helps you focus and keeps you moving in the right direction as you process the call.

  ?: How do call strategies control your calls?
  A: Since you know where you want to go in the call – the questions to ask and the order for those questions—you are able to keep the caller on the same track, which allows for better control.

  ?: How do call strategies make your calls more efficient?
  A: Even though your callers may start talking on tangential topics, you are able to bring them back to where you need them to be in the call. This makes your calls more efficient.

What to Do	What to Say

?: How do call strategies help to contribute to the customer's perception of receiving excellent service or advice?
A: Customers typically want you to control the call. (Remember the customer want for a "knowledgeable rep??") By using call strategies, your calls are well-controlled, efficient and focused. This means better service for your customers!

Example of a Call Progression/ Strategy and Objective (5 minutes)

- Walk through the workbook example on page 46, being sure to highlight parts of the call progression that meet customer wants (Timeliness, Knowledge, Accountability, Problem Solver, Caring, Zeal).

Types of Calls Received by Our Company (3 minutes)

- List the main types of calls received by your company – putting one call per flip chart page. (Examples of call types include: complaint calls, place and order, follow up, return, inquiry.)
- As you are listing these on each individual flip chart page, have participants write each type in their workbooks.

What to Do	What to Say

Developing the Call Strategies and Progressions For each call type. (15 minutes)

- Divide the class into as many groups as you have call types.
- Assign on call type to each group.

- Have each group complete a call strategy for each type of call they receive. (They can use the example on p. 46 as a guide.)
- NOTE: If your company already has call strategies in place for each call type, omit this exercise and hand out the call strategies at this point and go over them.
- If you do the exercise, allow the groups 10 minutes to complete the exercise.

Debrief
(10 minutes)

- Have participants present their call progressions, if your company doesn't already have call strategies in place.
- Be sure to have participants link each part or step of the call progression to one of the six customer wants.

Go to the phones
(30 minutes)

- ♦ Instruct participants to go to the phones and take two calls, implementing the call strategies developed in this unit (or using the call strategies already developed by your company.)

Debrief
(10 minutes)

- ♦ Solicit responses as to how the call strategies helped participants control and focus the call.

Unit #7: Managing Difficult Callers

Objectives: After completing Unit 7, participants will be able to:

- Identify the main caller attitudes that can cause problems.
- Be able to recognize and successfully manage each type of caller.
- Use empathy statements appropriately.
- Explain three reasons why callers are difficult.

Timing: **1 hour; 25 minutes**

Method / Media: Trainer lecture, group activity, discussion. phone work.

Materials:
Workbook pages 53-59**.**
Attitudes Game Cards
Call Bells (Optional)
Attitude Scenario Cards
PPT # 20-21

What to Do	What to Say

Introduce Unit VII
(1 minute)

- Give unit objectives.
- Explain purpose of module, which is to be able to identify caller attitudes, and manage those attitudes successfully.

Why Callers Are Difficult
(1 minute)

- As you are giving the three reasons why callers are difficult, have participants write those reasons on p. 54 of their workbook.

What to Do	What to Say

- Callers are difficult for one of three reasons:
  (1) You have to deliver some sort of bad news to the customer
  (2) The customer has strong emotions
  (3) The customer has a bad attitude.

  - We'll talk about how to handle customers when you have to deliver bad news in the next unit. In this unit, we'll focus only on the caller attitudes and emotions, since you have to get the caller's emotions in check before they will be able to even hear what you have to propose as a solution.

Six Difficult Caller Emotions And Attitudes
(5 minutes)

- <u>Briefly discuss each type of attitude. You may want to ask the group for any stories they may have about dealing with a specific type of attitude or emotion.</u>

Using Empathy Statements
(4 minutes)

- On page 56 of your workbook, the first sentence says, "Don't use the phrase________." What phrase do you think we mean?
- <u>Solicit answers</u>
- The phrase we don't want to use is "I understand." It's used too much and, therefore, customers perceive it to be fake and insincere.

  ?: So, if you can't use the phrase, "I understand" what can you use to show empathy?

  A: To get an idea of the answer, read the remainder of page 56.

What to Do	What to Say

Debrief Empathy Reading (2 minutes)

- So, instead of using the phrase, “I understand,” it would be preferable to use an adjective to identify the type of emotion they’re feeling (eg: angry, frustrated, upset, unhappy) to validate the customer’s emotion.
- After using an adjective to describe the emotion, show that you “get” why they are feeling the way they do.
- That’s what’s wrong with using, “I understand.” It doesn’t validate the customer’s emotion—and it certainly doesn’t go the extra step of demonstrating to the customer that you know why they are feeling the way they are. Remember, we’re here to WOW the customer!

MODEL for Handling Difficult Callers (5 minutes)

- In addition to empathy statements, there are a few other steps you must go through to diffuse an angry caller and get to problem-solving. For those extra steps, read the model for handling difficult callers on page 57 of your workbook. Then read page 58 for an example of how to apply the model.

Debrief Reading (2 minutes)

?: What specific questions or comments do you have about the model and the example?

<u>Respond to participant questions and concerns.</u>

What to Do	What to Say

Applying the model: The ACKNOWLEDGING GAME! (20 minutes)

- <u>Explain Game Rules: </u>In your workbook, on page 59, there are six negative caller attitudes.
- In my hand I have several cards, each with a statement that demonstrates a particular attitude. For example, I may have a statement that says, “the caller begins to cry.”

That would be an example of a distraught caller. So, the first team to ring their call bell and say, “Distraught,” would get five points, and a chance to answer a distraught caller’s actual statement.

Let’s say my follow up to the statement: “The caller begins to whine and cry” was “Oh, I’m so worried. I don’t know what I’ll do it this isn’t fixed soon. Boo-hoo.” Then the team would have to give me ***what they would actually say*** to the caller – using the model for handling callers with bad attitudes. In this case, your team may say, “Ms. Caller, I can hear how upsetting this is to you. (ACKNOWLEDGE) I’m here now and I’ll help you. (Take ACCOUNTABILITY) Please tell me exactly what is wrong. (QUESTION) [The caller would then give a response.] Then your team would continue, “OK, then, what I will do to help is offer you these two options.” (INFORM WITH VALUE). How does that sound?” (Get the BUY IN)

What to Do	What to Say

- So, your team can choose one person to handle the mock call.
-
- **FACILITATOR NOTE:** Be sure to tell participants that if they give a correct response, you will de-escalate. But if they give a response that does not follow the model for acknowledging attitudes, that you will continue to escalate until they give you an answer that’s correct. (Exaggerate with your escalations to make it fun and funny, yet still get the learning point across.)

- <u>Divide class into teams of three to four. Give each team a call bell and six attitude cards. In</u>

lieu of a bell, team members may just raise their hand.

- Begin play and continue until all scenario cards have been used.

IF you have prizes, hand out prizes.

Go to the phones.
(30 minutes)

- Instruct participants to go to the phones to take live calls, focusing on using the model for handling customers with difficult attitudes.

Debrief
(10 minutes)

- Solicit participant responses regarding the effectiveness of the model.
- Discuss results of your call monitorings during the phone calls.

Unit #8: Delivering Bad News to a Caller

Objectives:

After completing Unit 8, participants will be able to:

- List the types of bad news they have to deliver to customers
- Be able to deliver bad news in a positive way to customers
- Use replacement phrases for the "Top Ten Forbidden Phrases in Customer Service."
- Reinforce the VALUE of our products during returns and refunds.

Timing: **1 hour; 30 minutes**

Method / Media: Trainer lecture, group activity, discussion. phone work.

Materials: Workbook pages **60-65.**
Flip Chart paper and markers for group activity
PPT # 22-24

What to Do	What to Say

Introduce Unit VIII
(1 minute)

- <u>Give unit objectives.</u>
- <u>Explain purpose of module,</u> which is to be able to deliver bad news to a customer in a positive way, so the customer will "buy into" your solution.

Types of Bad News
(3 minutes)

- <u>Divide participants into groups of three to four.</u>

What to Do	What to Say

- Have participants list the types of bad news they have to give to customers on page 61 of the workbook. (EG: "I can't get the shipment to you by tomorrow," or "Your product is past the warranty period" are examples of types of bad news that you may have to give to a customer.)
- Instruct participants that they will have 5 minutes to complete the exercise.

Debrief lists
(2 minutes)

?: What are some types of bad news you said you have to deliver to customers?

- Solicit Responses.

Model for Delivering Bad News
(2 minutes)

- **?:** So, how can you deliver such bad news in a positive way?
- **A:** With the model for delivering bad news!

  - Instruct participants to read through the model on page 62.

Debrief Reading
(5 minutes)

- **?**: What specific questions do you have on the model?
- Answer participant questions about the model.

Explain the rationale for the Model
(10 minutes)

- ♦ Spend some time talking about the "why's" and "how's" of the model.

?: In the first step, how can you show empathy or concern?

What to Do	What to Say

A: By doing the following:

(1) LISTEN
(2) DON'T INTERRUPT
(3) Use acknowledging statements
(4) Use an empathetic tone
(5) Show you "feel their pain" by reflecting back to the customer what they said and why they're upset.

?: In step two, why do we need to include a benefit to the customer for what we're going to do next? Why can't we just get on with it and tell them what we're going to do without the explanation?

A: Because by explaining the WHY, you are demonstrating ZEAL to go above and beyond just telling them what you're going to do. Also, when you state a benefit, you show the customer that you CARE about their concerns. ZEAL and CARING are two important customer wants. Finally, by explaining the WHY, you are differentiating the VALUE of our customer service team.

?: What are some of the benefits we can speak to when explaining next steps?

A: (*FACILITATOR: You may want to take specific examples of next steps for common problems and list benefits. Or, you can facilitate to the more general responses suggested below. Either way, be sure to facilitate toward the six customer wants):*

(1) SAVE TIME. You could say that by transferring, you will help the customer save time by getting the right person right away.

What to Do	What to Say

(2) KNOWLEDGE. By explaining the REASON why the shipment will take four days instead of one, you are demonstrating a knowledge of how your delivery system works. This gives the customer confidence that your answer is correct.

EG: *What we've found is that the shipper we use seems to package the products more carefully than other, faster shippers. Because we want your product to arrive in good condition, we have gone with this vendor—even though it may take more time to get to you.* (This is also reinforcing a QUALITY benefit.)

(3) PROBLEM SOLVER: Explain the WHY to show you can solve the problem: *EG: To make sure the problem is solved properly the first time, what I would like to do is….."*

(4) ACCOUNTABILITY: *EG: I will investigate this further to see if there are any other options available. Because I don't want to just give you a guess as to what we might be able to do, I'd like to contact one of our managers in that department and call you back.*

?: In the third step of the module, what phrases do you think we should AVOID when informing the customer of the bad news?

A:

- I can't
- I won't
- That's not our policy
- Unfortunately

What to Do	What to Say

Transition to Top Ten Sayings

Let's look at some alternative phrases to these. Turn to workbook page 63.

Top Ten Forbidden Phrases in Customer Service (5 minutes)

- Refer participants to workbook page 63.
- Go through each "forbidden phrase," asking participants what they would replace the phrase with.
- Suggested replacement phrases for the corresponding numbered "Forbidden Phrases" in the workbook are below:

1. "It would be helpful if…"
2. "Is there anything else I can help you with?"
3. "What I *can* do is….."
4. "What I *will* do is…."
5. "It would be helpful if" or "Would you please…."
6. "What I *can* do is…."
7. Offer the customer options of things you can do.
8. "You obviously have more information that I do on that. Could you tell me more?" (This is a very effective technique to use when you're dealing with a person who *thinks* s/he knows it all, but s/he really doesn't. In the course of "telling you more," they will trip themselves up, and will then be more open to listening to your suggestions.)
9. "That's a great question. I'll find out!"
10. "I'd be happy to." (Using the phrase, 'No problem' implies that it normally would be a problem.)

What to Do	What to Say

FACILITATOR NOTE: If appropriate, this is a good place to insert grammar and regionalism issues. (EG: "Git" for "get;" "Hode on" for "hold on;" "Fixin'" for "Planning," "Axe" for "ask," etc.

Application Exercise:
Applying the Bad News Model
(10 minutes, including directions)

- Divide participants into pairs.
- Assign each pair one to two types of bad news that they came up with from the exercise on workbook page 61.
- Have groups write out a "bad news answer" for the bad news type they are assigned. Their answer MUST follow the model steps.

Exercise Debrief
(5 minutes)

- ♦ Instruct participants to present to the class the answers they came up with for delivering their specific bad news to the customer.
- ♦ If any particularly WOW examples come up, reinforce those with some type of positive recognition. MAKE A BIG DEAL ABOUT THE WOW FACTOR!

Transition to REINFORCE VALUE Model.
(10 minutes)

?: Why do our customers spend so much money on products they could buy elsewhere for a much lower price? (For example, our $199 coffee pot)?

A: Because there is a perceived higher value and quality to our products.

What to Do	What to Say

- ♦ That's right. And as you'll see in Unit 11, QUALITY is one of the main customer business driver needs.

?: What do we mean by "quality"?

A: Something that has a higher degree of excellence in how it's made, or something that implies a higher status or image.

?: What are some companies and products (other than ours) that you equate with quality?

A: Coach, Bang and Olufson, Nordstroms, Motorola, Lexus, Porsche, Hagen Daz, etc.

?: Are these products higher-priced that other comparable products? For example, does a couch purse cost more than one from K-Mart? Does Haagen Daz ice cream cone cost more than your grocery store brand?

A: Yes.

?: As a rule, do these higher-quality, higher-prestige products ever go one sale?

A: No.

?: If there's a defect, do you get a "money voucher" – or do you get a replacement product instead?

What to Do	What to Say

A: Usually a replacement product.

?: Why do you think that is?

A: Lowering the price or giving away vouchers lowers the value of the product.

SAY: That's right! And that's exactly what we do with OUR products when WE offer a cash voucher for a discount off other products.

From this point forward, let's assume we have a policy of NO DISCOUNTING. It's bad for our product, it's bad for our image and it's bad for our company. (Historically, companies that have cut price have gone out of business. For every 25% you discount, you need a 100% increase in sales just to break even. So, for example, if you sell 100 units of something per week at $100, you'll need to sell roughly 200 of the same product if you discount it to $75.

[FACILITATOR NOTE: You may want to walk through an example with one of your top-selling products, taking into account profit margin, etc. This will give participants a real-life snapshot of how discounting negatively impacts a business.]

[It is important to note that SOME discounters have been successful; i.e., Sam Walton of Wal-Mart. But they can ONLY be successful with MASSIVE increases in sales. A company that doesn't offer "every day needs" (such as cleaning supplies, etc., such as Wal-Mart does,) can't succeed by discounting.]

What to Do	What to Say

What to do when a customer Asks you for a discount voucher. (3 minutes)

So, what are you to do when a customer asks for a discount voucher? Use this phrase:

"I want to personally make sure you get the RIGHT product with TOP QUALITY in your home. I want you to be able to fully enjoy that product every time you use it or look at it. Let's see what we can do to get you a new product."

If a customer says, "Yeah, fine. But what about my inconvenience?"

Then, a good response is: "It is frustrating to have to go through setbacks and wasted time. I'm sure you purchased one of our products because you are well aware of their quality and durability. Here's what I'll do: Our normal time frame for returns is 30 days. I want you to be happy with the product, so I'll call you within 35 days after you get the product, and see how you like it. If at that time you aren't satisfied, you can return the product for a full refund. If you haven't found that the setback of the wasted time was offset by the product performance and your enjoyment of the product, again, I will be happy to offer a full refund and you can return the product."

In this case, you ARE offering something –to extend the return deadline. But you are NOT offering a voucher or discount of any kind.

What to Do	What to Say
Go to the phones. (20 minutes)	Instruct participants to go to the phones and take calls, focusing on using the model for delivering bad news, using the replacement phrases to the "Forbidden Phrases." *And* not giving any discounts or vouchers!
Debrief Phone Activity (10 minutes)	♦ Present findings from your monitoring ♦ Discuss the "WOW's" you observed. ♦ Discuss the "OW's" that you heard.

Unit #9: Strategic Questioning

Objectives:

After completing Unit 9, participants will be able to:

- List the most common types of questions to use
- Explain the four reasons to use questions in a customer service interaction
- Apply strategic questioning to specific scenarios.

Timing:

1 hour; 35 minutes

Method / Media:

Trainer lecture, group activity, discussion. phone work.

Materials:

Workbook pages **66-74.**
Puzzle Game
Flip chart paper and markers
PPT # 25-27

What to Do	What to Say

Introduce Unit IX (1 minute)

- Give unit objectives.
- Explain purpose of module, which is to be able to use strategic questioning to gather information and guide and control the call.

What to Do	What to Say

Introduce Puzzle Activity (5 minutes)

SAY: An important part of what you do on the phone involves asking questions. Your job is to ask the right questions the right way at the right time.

- Our objectives for you regarding questions is to know when and how to:
  (1) Ask questions that encourage the caller to respond freely.
  (2) Ask questions that limit a caller's response to a "yes" or "no," or to getting specific information.
  (3) Use open and closed questions to gather information and guide the conversation.
  (4) Demonstrate questioning to efficiently guide the call to a successful conclusion.

- Before we get into quesitoning, though, I'd like to test your problem solving skills.

- Divide participants into groups of four
- Assign one person in each group to play the customer
- Assign the other three members to be the associates.
- Provide game instructions:

  - SAY: Your goal as a group is to assemble the puzzle as quickly as possible.
  - You may ask as many questions as you like and the customer may answer them.
  - The customer may NOT offer any information that is not asked of him or her.
  - During the exercise, the customer may NOT look at what the group is doing and the group may NOT look at the customer's diagram.
  - Ask the customer to sit with his or her back to the team or put up a visual barrier.
  - The team that finishes first gets a prize.

- Distribute customer cards to customers.
- Distribute team envelopes to teams
- Begin the exercise

What to Do	What to Say

Participants conduct exercise

(20 minutes)

- Give participants 20 minutes to complete the exercise.
- If no one has completed the puzzle after 20 minutes, stop the game.

Debrief the exercise:
(5 minutes)

- Ask the winning team: Who controlled the conversation? Why did that seem to help you solve the puzzle?
- ASK: What kinds of questions helped you solve the puzzle – open or closed?
- ASK: What one question was most helpful in getting you on the right track?

- **FACILITATOR NOTE: [**The learning point is that many teams will try to solve the puzzle almost entirely on their own – asking few or no questions of the customer. The real issue is that all the answers to all the problems are with the customer –but you have to ASK!!**]**

Transition to Types of Questions

- Let's look more deeply into the types of questions and when to ask each type.

What to Do	What to Say

Types of Questions
(2 minutes)

- Three types of basic questions are used in customer service. Please list these three types in the blanks on page 66 of your workbook.

(1) OPEN – used to get the caller to open up and tell you more about the issue.

?: Who can give me an example of an OPEN question?
A: What happened? Can you tell me more?

(2) CLOSED questions – which limit the caller to a "yes" or "no" response—or a one-word response.
?: What's an example of a closed question?
A: "Did you send the claim to this address?" "What time did you call?"

(3) CLOSED CHOICE questions – which are questions that give the caller a choice between two options.

EG: "Would you prefer to be invoiced or pay by credit card?"

Four reasons to ask questions
(5 min.)

- Write four reasons to ask questions on flip chart.

1. Identify the issue, concern or reason for the call.
   - **EG:** "How may I help you?"
   - "What seems to be the problem?"

What to Do	What to Say

2. Identify the severity/extent/reach of a problem.
   - **EG:** "How long has the convection oven been having thermostat problems?"
   - "When did you place the order?"

- "How long has it been since the replacement order was made?"

3. Guide and Control the call
   - **EG:** "The flooding in your area probably wouldn't have had an impact on delivery times. Can I ask if you usually have your FedEx deliveries dropped off at your front door, or are they put in a box or other secured area?"
   - **(After the customer has been rambling)** "I was just looking at the order screen and I noticed I'm missing some information. Which color would you prefer – the green, clear or blue?"

4. Qualify / Process a customer or a customer order
   - **EG:** "May I have your credit card number?"
   - **"**May I have your phone number, please?"
   - May I have the source code in the yellow box on the back of the catalog?

- <u>Explain the four reasons to ask questions and have participants write the reasons on page 67 of their workbook.</u>

What to Do	What to Say

Identify common customer statements That your company gets in customer Service (10 minutes)

?: When customers call in, what are some statements they typically make that indicate problems?

- <u>Solicit answers from the group.</u>

- <u>Write list of common statements on a flip chart.</u>

[Some examples of customer statements that could indicate problems include: "My bill is confusing," "My order didn't arrive," "The product is defective," "It's the wrong product." Develop statements that are specific to your company and your industry.]

- Instruct participants to write the list of the most common concerns on pages 68-69 of the workbook.

Building the Strategic Question List For Your Most Frequent Customer Concerns (8 minutes)

- Divide participants into pairs.
- Assign on common customer concern from the list to each pair.
- Instruct the pairs to write at least four questions they could ask the customer when they hear the common concern statement. They should try to include one question from each of the four reasons to ask questions. (From workbook page 67).

What to Do	What to Say

- Participants will have 10 minutes to complete the exercise.
- Participants should write their questions on the appropriate workbook page (70-73)

Debrief activity (4 minutes)

Ask each pair to share their questions.
As each pair is presenting their questions, instruct the other participants to write down questions they think are particularly good on the appropriate workbook page (70-73)

Go to the phones (20 MINUTES)

- Instruct participants to go to the phones and take 2-3 calls – focusing only on their questioning skills.

Debrief phone work (10 minutes)

- Discuss positives and negatives you observed in your monitorings during the phone work session.
- Solicit responses from participants as to which types of questions were most helpful on the phones.

Unit #10: Informing

Objectives:

After completing Unit 10, participants will be able to:

- List the two steps to "best practices" informing
- List the four types of customer expectations to manage.
- Follow up at the right time and in the right manner for greatest customer satisfaction.

Timing:

1 hour; 15 minutes

Method / Media:

Trainer lecture, group activity, discussion. phone work.

Materials:

Workbook pages **75-78.**
Flip chart paper and markers.
PPT # 28-29

What to Do	What to Say

Introduce Unit X
(1 minute)

- <u>Give unit objectives.</u>
- <u>Explain purpose of module,</u> which is to be able to inform and follow up for maximum customer satisfaction.

What to Do	What to Say

Two steps to Informing (5 minutes)

- On page 75 or your workbook, you'll find spaces to write the two steps to informing.
- The first step is STATE THE ANSWER, INCLUDING WHY.

  (1) The "why" should include a benefit to the customer. For example, let's say a customer says she has a product that arrived damaged and she wants a new one shipped, but your company policy is that no new products are shipped out until the old one is returned. You could say to the customer*," I'd be happy to send you another replacement product. So we can expedite a new order to you, it would be helpful for us if you would package up the damaged piece and send it back to us at our cost. Then we'll ship another one out to you the same day. We like to have the damaged product so we can inspect it to see where there may be quality problems with our production."*

  ?: What would be an example of giving the answer, including a "why statement" that has a customer benefit?

  - Solicit responses.

  (2) Explain the next steps, including time frames.

  ?: What customer wants does explaining the next steps satisfy?

  A: Timeliness, Accountability and Problem Solving.

What to Do	What to Say

Types of Expectations To Manage (4 minutes)

- It is in the INFORMING stage when most customer expectations are *MIS*MANAGED. This is usually the step where things go haywire, and misunderstandings occur.
- <u>Instruct participants to read page 76.</u>

Debrief Reading (3 minutes)

?: What would be an example of a next steps expectation that you will have to manage in our company**?**

A: **[**Take any examples from your company**,** such as delivery time frames, refunds, product exchanges, etc**.]**

?: Why do you think it's important to use the phrase: "*I* will do this…" or "*I'll personally* take care of this"?

A: Because using I shows you are willing to take accountability for the end result. If you say, "What we will do is send out a new product to you tomorrow," the customer begins to think, "Oh, great. If I don't get the new product tomorrow, I'll have no one to personally call." Accountability is paramount with customers – especially in problem-resolution issues. Eliminate the "we" from your vocabulary and use the word "I."

Incidentally, the same thing applies when a customer gives you a compliment. If the customer says, "I just called to tell you how much I like your product, " respond with "Thank you so much! I'm so happy you liked it!"

What to Do	What to Say

Follow Up (10 minutes)

- <u>Tape three flip chart papers to the wall. Label one flip chart: "Serious Problem Calls"; Label another "Billing</u>

Issues” and Label the third “General Problem Calls (Non-Serious).

- From workbook page 68-69 from Unit 9, as a large group place each customer concern onto one of the three appropriate flip charts.
- Have participants count off by threes.
- Have all “ones” go to the first flip chart, all “twos” to the second flip chart and all “three’s” to the third flip chart.
- Have each group write a mock follow up statement for at least two of the customer concerns on their flip chart. Participants should use the 4-step follow up method from page 78.

Exercise debrief
(5 minutes)

- Solicit activity responses from the group, and make suggestions for improvements based on your industry and your company’s specific areas of concern.

Go to the phones
(30 minutes)

- Instruct participants to go back to the phones and take 2-3 calls, focusing on using the model for informing.
- Monitor calls as participants are taking calls.

Debrief Call activity
(10 minutes)

- Go over your list of observations from the call monitorings.
- Solicit responses from participants as to what went well, what could be improved and what they will do differently next time.

Unit #11: Product Knowledge for Cross-Selling and Upselling

Objectives:

After completing Unit 10, participants will be able to:

- List the top seven business driver needs of all business customers.
- Know the features, benefits and business drivers of the main products so that you can later position those benefits into a selling semantic.

Timing:

1 hour; 5 minutes

Method / Media:

Trainer lecture, group activity, discussion. phone work.

Materials:

Workbook pages **79-85**
Flip chart paper and markers.
PPT # 30-31

What to Do	What to Say

Introduce Unit XI
(1 minute)

- Give unit objectives.
- Explain purpose of module, which is understand the features and benefits of your products and to understand why customers buy products. (To meet one of their business driver needs).

What to Do	What to Say

Identifying BUSINESS DRIVER NEEDS activity.
(10 minutes)

- ♦ Divide training class into pairs.
- ♦ Instruct each pair to imagine that they are about to go shopping for a new bank.
- ♦ Have participants list, in their workbooks on page 79 what is important to them in a bank. What types of services do they look for? What types of products do they look for.
- ♦ Instruct participants to write down WHY each service or product is important to them. What is it that they hope the product or service will do for them? How will it help them? [This will get to their business driver needs.]
- ♦ Give participants ten minutes for this activity.

♦ Debrief Activity
(10 minutes)

♦ ?: What were some things you listed, and what were the reasons you gave for the items you listed?

♦ Solicit responses. [You will have things such as ATM locations, no fees for check cashing, no fees for overdrafts, bank retail locations, Internet Banking, FDIC, Bank reputation, etc.]

Transition to business Drivers
(3 minutes)

Many of the reasons you gave for wanting the specific products and services you mentioned are the same reasons most people want certain services.

What to Do	What to Say

- ♦ In fact, there are seven common “business driver needs” of all customers – regardless of the product or industry. Just as many of your needs for a bank fit into one of these seven categories, so, too, do the needs of our Williams-Sonoma clients fit into one of these categories.

- As you go through each category, place the items from the bank needs into the various categories.

1. Save time. How does the product help them manage their time better?
2. Save money. How does the product or service make them money or save them money?
3. Convenience. How easy is it to ACCESS the company? Do they have 800 numbers? Do they have Internet access? Do they have convenient hours?
4. Ease of Use. How easy is it to USE the product or service?
5. Security. Is there a guarantee in case the product doesn't work? Also, is there "Security" in the name of the company. Has the company been around for a long time? If so, does it have a reputation for always meeting customer needs? Is the company solvent?
6. Quality. Is the service or product reliable and of high quality?
7. Image. How does the product or service help the customer's image? (For example, if you are selling cellular phones and the phone often cuts out, it sends an image to the customers you are talking to on the cell phone that you don't care enough about customers to invest in quality communications equipment.)

What to Do	What to Say

- ♦ Instruct participants to write these business drivers in their workbook on page 81.

Identifying How Your Products and Services Satisfy The Business Driver Needs. (EXERCISE: 10 minutes)

- ♦ List your company's top ten products or services.
- ♦ Pair off participants
- ♦ Assign two products to each pair..
- ♦ Have each group fill out their the chart on one of the workbook pages 82-85.
- ♦ Walk through one example with participants:

- ♦ **EXAMPLE: Wusthof Classic Knife Set.**
- ♦ Go through the example on page 82 of the workbook.

- ♦ Go through this same process for the product or service assigned to you.
- ♦ You'll have five minutes to complete the form for your product.

Exercise Debrief: (10 minutes)

What to Do	What to Say
	♦ Ask each group what their product was, and what they got for each column in the form. ♦ Have other participants write answers from other groups in their workbooks. ♦ [AT THE END OF THIS EXERCISE, PARTICIPANTS SHOULD HAVE A COMPLETE LIST OF THE MAIN PRODUCTS OF YOUR COMPANY, AS WELL AS THE FEATURES, BENEFITS AND BUSINESS DRIVER NEEDS OF EACH. THIS INFORMATION WILL BE NEEDED TO COMPLETE THE NEXT UNIT.]
Go to the phones (20 minutes)	Instruct participants to go to the phones and take 2-3 calls, focusing exclusively on upselling and cross-selling using the features/benefits and business drivers of the products discussed.
Phone Debrief	♦ Share your notes from your monitoring session of the calls. ♦ Solicit responses from participants as to what went well, what could be improved and what they will do differently next time on calls.

Unit #12: How to Say It Without Sounding Like a Telemarketer

Objectives:

After completing Unit 12, participants will be able to:

- Know who to cross-sell
- Know when to cross-sell and up-sell
- Use the semantic for cross selling and up selling to customers.

Timing:

30 minutes

Method / Media:

Trainer lecture, group activity, discussion. phone work.

Materials:

Workbook pages **74-76.**
Scenario Cards –MUST BE DEVELOPED BY TRAINER PRIOR TO TRAINING THIS UNIT!!!

What to Do	What to Say

Introduce Unit XII (1 minute)

- Give unit objectives.
- Explain purpose of module, which is to be able to use the semantic –or the customer-friendly process--for cross selling and up-selling a customer over the telephone.

What to Do	What to Say

The Cross-Selling and Up-selling Semantic (2 minutes)

- Most customer service agents despise selling of any type. After all, when we think of telephone selling we think of those people who call us when we're in the shower or eating dinner.

- But that's not what telesales is. Telesales is very different from telemarketing in that with telesales, you don't "cold call" customers. Rather, you take cues and clues from customer comments about needs and offer solutions to those needs.

- There's a quick and easy system for following up on customer statements and turning them into sales opportunities:

  (1) Ask a question about past experiences.
  (2) Reflect back the need that the customer articulated to you
  (3) Recommend a product that would be a solution to the need
  (4) State a feature of the product or service that would specifically meet the need
  (5) State the benefit to the customer.

  - To see how this system works in action, please read workbook page 88.

Debrief reading (2 minutes)

<u>Ask participants what questions they have about the reading, and answer appropriately.</u>

What to Do	What to Say

Cross-Selling and Up-selling Practice Session (10 minutes)

EXAMPLE of a POSSIBLE SCENARIO CARD:
THE CUSTOMER WANTS TO PURCHASE AN AIR PURIFIER.

SAMPLE PARTICIPANT RESPONSE:
Do you find that there are a lot of very small dust particles around your house? Do you sneeze a lot?

Based on your need to have an air purification system that can pick up all of those little air particles, I'd recommend the Hepa filter. It does a much more thorough job of cleaning the air, which means you breathe less of the harmful and annoying air particles.

What to Do	What to Say

Exercise Directions to Participants

- Now it's time to put this semantic into action.
- I have six note cards in my hand, each with a different customer statement indicating an unmet need.
- I will choose one person from the group, and I will read the card to them. When I finish reading the card, you are to give the appropriate response—using the cross selling and up-selling semantic.
- <u>It may be necessary to do one first as an example.</u>

<u>End game after all six Cards have been successfully Responded to.</u>

Phone work

- Instruct participants to go to the phones and take one to two calls focusing on cross selling and up selling.

♦ Unit #13: FINAL REVIEW SESSION

Objectives:

After completing Unit 12, participants will be able to:

- ♦ Successfully recall the key points learned in the previous eleven sessions by responding to a series of scenarios in a Jeopardy Game format.

Timing:

30 minutes

Method / Media:

Game (On PowerPoint)

Materials:

Jeopardy Final Review Diskette
LCD Projector
Prizes (Optional)

What to Do	What to Say

Introduce Unit XII
(1 minute)

- Give unit objectives.
- Explain purpose of module, which is review key points from all previous units in a fun, interactive manner.
- Divide class into two teams.
- Have Teams choose team names.
- Explain rules:
  (1). Rather than play individually, you will play in teams.

What to Do	What to Say

(2)I will ask a team to choose a category and point value. Once you do, I will read the clue for that category and point value. You will have five seconds as a team to decide to pass the question on to the next team, or to play. If you choose play and you answer incorrectly, you will lose the points. If you choose pass, and the other team answer incorrectly, the team that the clue was passed to does NOT lose points.

(3) If a team answer a question correctly, they will get the points, and get to choose the next category and point value until they answer incorrectly.

(4) Play passes to the right.

♦ Begin play by asking each team to give you a month of the year. The month that the team mentions that is closest to a month you have pre-chosen gets to begin play.

FACILITATOR NOTE: PLEASE, **PLEASE** DO A PRACTICE RUN THROUGH OF THE ELECTRONIC JEOPARDY GAME BEFORE YOUR FIRST LIVE CLASS!! A FEW HINTS ABOUT USING THE ELECTRONIC GAME:

(1) **CLICK ONLY ONCE** ON THE POINT VALUE TO BRING UP THE CLUE. (If you double click, you'll bring up the wrong clue, since the game will skip ahead two frames instead of one!!)

(2) After you bring up the clue and read it, **TO GET BACK TO THE MAIN GAME BOARD, CLICK ONLY ONCE ON THE GREEN BOX ARROW** IN THE LOWER LEFT-HAND CORNER OF THE SCREEN. (Double clicking will take you to another clue and will not get you back to the main game board where contestants chose a category and point value.)

(3) WHEN YOU GET THE "DAILY DOUBLE" SCREEN (Hidden behind one of the point values**), CLICK ONLY ONCE ON THE GREEN "EXPLOSION" GRAPHIC** (Where the words "daily double" are written) **TO GET TO THE CLUE.**

GOOD LUCK…AND HAVE FUN!! ☺