



## Customer Service 101

This course  
should take  
approximately  
60 minutes.

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# Introduction

## How to Use This Guide

This guide provides facilitator instructions and presentation details for the *Customer Service 101* online class. The facilitator instructions describe the activities you must present, including when to click to advance the slides and how to introduce questions and activities. Questions, their corresponding answers, and talking points are included for each slide in the presentation. Use the legend symbols to determine if the information is a facilitator tip, what to say, a question for participants, or any other type of activity.

## Course Overview

This course is intended for all employees.

## Learning Objectives

By the end of this session, learners should be able to:

- Demonstrate proper use of the problem resolution process and principles when handling client calls
- Employ customer service principles with a focus on active listening and making emotional connections
- Demonstrate effective problem resolution

## Before the Session

- Review the PowerPoint deck in Slideshow mode.
- Log in 30 minutes early and click on the Welcome slide. This will ensure participants know they are in the right session.

## WebEx Breakout Sessions

### Creating a Breakout Session

1. From the WebEx menu bar at the top of the screen during a virtual classroom session, navigate to **Breakout**.
2. Click **Breakout** to open the dropdown menu.
3. Click **Breakout Session Assignment**.
4. Click to choose the **Automatically** or **Manually** option for assigning participants. (Automatic assignment will create groups of a specified size – for example, four participants per group – of randomly selected participants. Manual assignment lets you choose which participants are in each group, and the first student added to the group will be assigned as the presenter.)

### Facilitating Breakout Sessions

1. On the Breakout Session panel, click **Start** to commence intragroup discussions.
2. Breakout session presenters will receive a prompt asking them if they would like to start their session. After a Breakout session Presenter has accepted the invitation, other members of the session will receive a prompt asking them if they would like to join the session. All participants are then switched from the main audio teleconference to the breakout session teleconference.
3. Hosts have the option of joining one breakout session at a time. To join a Breakout session of your choice, click on the **Breakout** session you wish to join and click **Join**. You will then be connected to that session.
4. Communication tools and sharing work the same as in the main session except that participants communicate within their breakout sessions only.

5. All participants can ask the Host for assistance at any time. A **Raise Hand** icon appearing next to the student's name indicates that the student is asking for assistance from the Host/Main Presenter.

## Ending Breakout Sessions

1. In the main session, select **Breakout > Ask All to Return** to ask all participants in the breakout sessions to return to the main session.
2. Participants can click **End Session** to return to the main training session or **Continue** to wrap up the breakout session before ending the session.

# Legend

Icon	Description	When to Use
	<b>Break</b>	Break time.
	<b>Time</b>	Time breakdown for page or slide.
	<b>Say...</b>	Outlines talking points for each topic.
	<b>Facilitator tips</b>	Tips for delivering the related material.
	<b>Whiteboard</b>	Use the virtual whiteboard.
	<b>Participant guide</b>	Corresponding page in the Participant Guide.
	<b>Ask participants</b>	Ask participants the listed questions.
	<b>Group activity</b>	Arrange participants into groups for a group activity. Includes information about the duration, required materials, instructions, and debriefing.

	<b>Individual activity</b>	Participants individually perform the activity. Includes information about the duration, required materials, instructions, and debriefing.
	<b>Example</b>	The facilitator can use this to provide a real-life example or scenario for emphasis or clarity.
	<b>Demonstration</b>	Show participants a process or procedure.
	<b>eLearning</b>	Have participants launch and complete the specified eLearning module.

# Welcome!

	<p>5 minutes</p>
	
	<p>Anticipate a few minutes for learners to sign-in. Let everyone know that they can use the Chat feature if they have sign-in questions.</p>
	<p>Hello and welcome to your customer service training!</p>
	<p>Introduce yourself, include your experience, your role as a Facilitator for the session and your contact information.</p>



I'd like to remind you all that you will be called upon throughout the session and should remove any distractions for the duration of the session by:

- Setting your instant messenger profile to Do Not Disturb
- Closing Outlook

# Recap: Customer Service Self-Study



4 minutes

## Recap: Customer Service Self-Study

*Use the Raise Hand feature to answer...*

- ✓ Customer Service self-study activities
- ✓ Problem resolution process and key principles

- Active Listening
- Emotional Connections
- Resolving client concerns



You should have already completed the Customer Service self-study activities that introduced you to the problem resolution process and principles (including the importance of empathy and emotional connections, first point of contact resolution, and our keys to success).

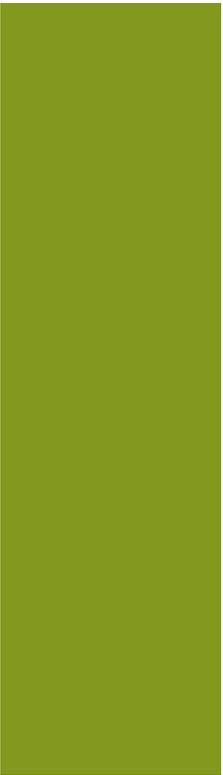
In this session we will go deeper into some of the topics you've been learning about in your self-study. We will focus mainly on Active Listening

and Emotional Connections while learning how to resolve client concerns at first point of contact.



Ask participants to open their Participant Guide to follow along and make notes as needed during our session today.

# What Experiences Do You Remember?

	<h2>5 minutes</h2>
	<div data-bbox="446 537 878 1016"><h3>Recap: Customer Service Self-Study</h3><p><i>Use the Chat feature to share your thoughts...</i></p></div> <div data-bbox="932 627 1349 688"><p>Reflect on your own experiences as a customer (either good or bad).</p></div> <div data-bbox="932 879 1268 911"><p>What made them stand out?</p></div> 
	<p>Before we begin, let's take a few minutes to discuss the importance of providing an exceptional customer experience through active listening.</p>
	<p>Take a moment and reflect on your own experiences as a customer (either good or bad). What made them stand out?</p> <p>Use the Chat feature to share your thoughts.</p>
	<p>As learners answer, look for the following:</p>

<b>Negative</b>	<b>Positive</b>
Didn't listen or didn't understand how I felt	Showed compassion
Didn't respect my time	Earned my trust
Didn't exude confidence	Asked questions to better understand my needs
Didn't resolve the issue	Resolved the reason for the call
Reinforce any of the items above if not mentioned.	

# Why is Problem Resolution Important?



5 minutes

## Why is Problem Resolution Important?

*Why is it important to resolve client concerns at first point of contact?*



Enhances the client experience



Earn the right to be our client's first choice



Delight clients and build relationships

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Why is it important to resolve client concerns at first point of contact?

Use the Raise Hand feature and I will call on you to share your thoughts.



As Employees answer, listen for the following, as applicable:

- Ownership of client issues at the first point of contact is proven to enhance the client experience.

- When we apply the “Make It Right” principles every time a client contacts us with a problem, we can earn the right to be our client’s first choice.
- Going the extra mile means more than just keeping our promise; it’s about delighting our clients and being passionate about building relationships.

Reinforce any of the items above if not mentioned.

# Committing to Active Listening



1 minute



## Committing to Active Listening

01 Listening for information or content

02 Listening for emotion or context

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There are two aspects of active listening:

- For information or content.
- For clients' emotions and circumstances (context).

In this session, we'll be discussing some common barriers to active listening, and strategies towards overcoming them. In the second part, we will be discussing how to use our active listening skills to recognize five basic client emotions, and how to acknowledge the circumstances behind them.

# Why is it Important to Actively Listen?



15 minutes



### Why is it Important to Actively Listen?

- 01 Exceptional customer experience and first call resolution
- 02 Positive customer survey ratings
- 03 Award-winning customer service ratings

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So, why is it important to actively listen?

Active listening allows us to provide:

- An exceptional customer experience and first call resolution
- Positive customer survey ratings
- Award-winning customer service ratings

Let's begin by listening to a quick story.



**Read this part at REGULAR PACE and create a distraction (sound) in the background. (For example, you could bang on the desk or have your phone alarm go off).**

You were running along Route Three late in the afternoon when you noticed 3 people walk quickly out of a convenience store. You had to stop to tie your shoelaces. While you were stopped you saw 3 people get into a small foreign car and take off very quickly.

**Read this part at a FAST PACE:**

The car was grey in color and its license plate was WAGN2. As they drove away, a woman came running out of the convenience store shouting and waving her arms. You run over to the woman and found out that she had just been robbed.

**Read this part at a MIXED PACE – Choose your own ACCENT/STYLE and create another distraction (sound) in the background:**

The stolen items included over \$300 in cash, 2 boxes, and the woman's purse.



In the Participant Guide, instruct learners to turn to the activity called **Why is it Important to Actively Listen?**



Using the whiteboard, share any barriers and/or challenges you found impacted your ability to actively listen to the story.



**Go to Share > Whiteboard.**

Tell learners to select the **text icon (Aa)** on the left side of the screen and then type their response on the whiteboard under the appropriate headings:

- **Communication:** “How did the way the story was read impact your ability to listen?”
- **Attention:** “What did you hear while I read the story that may have taken your attention from the information given?”
- **Personal (Unconscious Biases):** “Even when there are no communication or attention factors impacting our ability to actively listen, what may also cause a challenge to get all the details from the story?”



Validate the answers, instruct the participants to make notes in their Participant Guides, and ensure the tips in the *Overcoming Listening Barriers* reference guide are mentioned.

# Call Listening

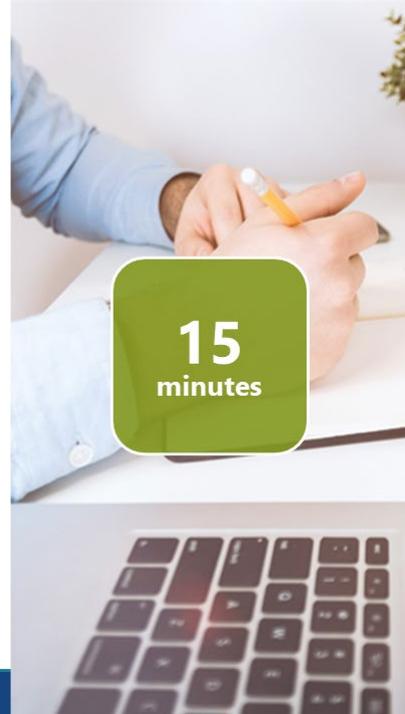


15 minutes

## Call Listening

 **Group Discussion**  
Use the Raise Hand feature to share your thoughts.

-  **Questions**
- How did the employee connect emotionally?
  - How did the employee demonstrate Active Listening?
  - What other behaviors did you see demonstrated?



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Let's pretend we are in a playback coaching session and listen to an experienced employee handling a client call. While we're listening to the calls, identify the behaviors you see demonstrated.



In their Participant Guide, instruct learners to turn to the activity called **Call Listening**.



Play the recording. Once the call is finished, lead a discussion with the group.



Discuss what the employee did well and what could be improved. Ask the following questions and call on participants to respond.

- How did the employee connect emotionally?
- How did the employee demonstrate Active Listening?

# Summary and Next Steps



10 minutes

## Summary

*Type your responses in the Chat Window...*

What are your takeaways?

What is your customer service commitment as you continue your training journey?



You're now able to:

- Demonstrate proper use of the problem resolution process and principles when handling client calls
- Employ customer service principles with a focus on active listening and making emotional connections
- Demonstrate effective problem resolution



Facilitate a brief group discussion around the questions below. Use the Raise Hand or Chat Window features.



- What are your takeaways after this session?
- What is your customer service commitment as you continue your training journey?