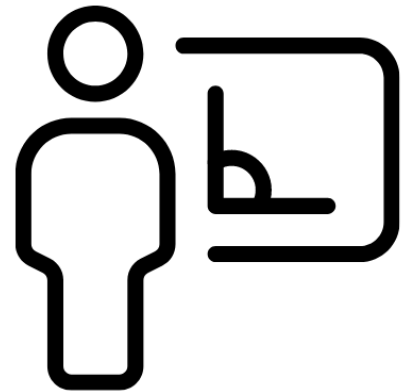


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



If you're not serving the customer, your job is to be serving someone who is.

Jan Carlzon

Module Two: It Starts at the Top



There is a very common saying, 'Attitude reflects leadership.' A manager sets the tone for the whole staff. If a manager shows the staff that having the appropriate information is important, it will be more likely to be utilized. You can help your staff be the best contact center possible by creating an open culture, knowing the goals of the company, knowing your employees' job duties, and being able to identify additional training opportunities. A manager has to have their eyes peeled at all times for new information needed, and new ways to

deliver that information.



Create an Open Culture

When you are a manager, it is important that you create an open culture with your staff. What is an open culture? An open culture means that as a manager, you are creating an environment where employees feel free to share ideas and concerns. This type of environment helps employees feel empowered and important, which helps them want to come to work and do a great job. When an employee starts to feel like they don't matter to a company, it can bring down, not only the whole department, but the company itself. Here are some ideas that will help you create an open culture in your company:

Lose the door – taking out the door or leaving your door open tells your staff that you're available for them.

Don't be secretive – you are not working for the Pentagon, tell the staff what's up. When you as a manager keep secrets, it has a tendency to make the staff feel paranoid, and/or unimportant.

Recognize that change is not always black and white – change can be hard on anyone. There will always be the good with the bad. Let your staff tell you their opinions on changes that were made. Be open to their concerns and suggestions

Have one on one training sessions with your staff members- this helps the staff members get to know management on a more personal level, and makes them more likely to voice concerns or suggestions later on.

Estimated Time	8 minutes
Topic Objective	Review creating an open culture.
Topic Summary	Create an Open Culture Discuss what an open culture is and why it's important.
Materials Required	Flipchart/board, marker
Planning Checklist	None
Recommended Activity	Discuss the section as a group. What additional ways can you come up with to create an open culture in your company? List suggestions on the board, vote on the top 3 ideas.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Have you worked in a business that had an open culture?

Understand Goals



The worst thing a manager can do is to not understand the goals of the company. This entails looking at the company as a whole, in a large scope. Try asking yourself, and your supervisor these questions:

- What is the company trying to achieve?
- What are the company's long-term and short-term goals?
- What does the company need in order to accomplish these goals?
- How can my department help facilitate those goals?

Without knowing where the company itself is wanting to go, you won't know how to get there. Talk to your own supervisors to understand the goals of the company. Once you understand what the company wants to accomplish, you can set goals for your staff. When setting the goals for your staff, make sure to be very clear about the goal that you want to accomplish, and the steps it will take to accomplish it. Make sure that the goals you set are realistic.

Estimated Time	7 minutes
Topic Objective	Review the importance of understanding a company's goals.
Topic Summary	Understand Goals Understand why you should know your company's goals.
Materials Required	None
Planning Checklist	None
Recommended Activity	Does your company have goals? Discuss as a group the goals of your company. How can you help the company achieve those goals?
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Do you know what your company's goal is?

Understand Agents' Responsibilities



There is nothing worse, from an employee standpoint, than a manager that doesn't understand the job duties and processes of an employee. If the manager doesn't understand responsibilities of a contact center employee, how is the employee supposed to understand them? Take the time to talk to your supervisors so that you know what is expected of your employees. If you are a new manager, asked to be trained as if you were one of your employees. This way you can see the processes, and learn how to improve them for your employees and customers. Knowing their processes and what their job responsibilities are also helps you train future employees.

Estimated Time	7 minutes
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Topic Objective	Review why a manager should understand an agent’s responsibilities.
Topic Summary	Understand Agents’ Responsibilities Recognize the benefits of understanding an agent’s responsibilities.
Materials Required	Flipchart/board, marker
Planning Checklist	None
Recommended Activity	Discuss as a group the benefits of understanding an agent’s responsibilities. Make a list of pros on the board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Do you know your employees’ job responsibilities and processes?

Identify Education Opportunities



There is never a point when an employee has learned too much. Employees who learn are more engaged in their jobs. As a manager it’s your job to make sure that your employees remain engaged, and are effective in their positions. You can see what training or education would be beneficial to the company and employee. Having educational opportunities helps maintain employee engagement, thus retaining more employees. Engaging employees helps them feel important and part of the company, instead of just another lackey. Education opportunities can come in many shapes and sizes. Here are just a few different educational opportunities your company could provide for your employees:

- College tuition reimbursement
- Cross Training
- One-on-one training
- Seminars & workshops

Having these education opportunities helps the employees feel like the company cares about their personal growth. Happy employees create happy customers.

Estimated Time	7 minutes
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Topic Objective	Review why it's good to identify employment opportunities for your employees.
Topic Summary	Identify Education Opportunities Recognize the types of employment opportunities that could be available for your staff.
Materials Required	Worksheet 1: Education Opportunities
Planning Checklist	None.
Recommended Activity	Fill out the worksheet individually. Discuss results as a group.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Why should you worry about getting your staff more education?

Practical Illustration



Liam has been hired as a new member of the management team at Schneider & Associates. Emma is Liam's supervisor, and she wants to make sure Liam has the resources he needs to succeed. She works one on one with him, and explains the company's goals. She tells him about the Open-Door policy, and how important it is that he is available for his staff just as she is for him. Emma has Liam train with one of the company's top performers in his department. She wants him to know the processes in which the employees perform their tasks. While Liam trains, he asks the employee questions about what they would change about their current processes. He gets some ideas on how to improve their procedures. Liam is very excited to help his employees be the best they can be.

Estimated Time	8 minutes
Topic Objective	Outline the 'It Starts at the Top' Practical Illustration.
Topic Summary	Practical Illustration Discuss the importance of learning from an agent's point-of-view.
Materials Required	None

Planning Checklist	None
Recommended Activity	Discuss the outcome of the Practical Illustration. Why did Emma ask Liam to train as if he was one of his employees?
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Was training with his top performer helpful?

Module Two: Review Questions

1. What is an open culture?
 - a) Creating an environment where employees feel safe to express ideas or concerns
 - b) Creating a work space that has no walls, windows, or doors
 - c) Creating an environment where employees are discouraged to express ideas or concerns
 - d) None of the above

An open culture is interperated in this context as a work environment in which the manager makes the employees feel comfortable to share ideas and concerns. An open culture helps employees feel invested and paramount to the company. When an employee is engaged in their job, this helps them want to come to work and do a great job.

2. Which of the following should a manager not do when creating an Open Culture in the workplace?
 - a) Leave his door open
 - b) Recognize that change is always black and white
 - c) Be transparent about goals, or issues the department is having
 - d) All of the above

There are many ways to create an Open Culture in your work place. Most important is that you want to convey to your employees that you are open to hearing what they are saying, be it good or bad. Change is hard for everyone, and the results are not always black and white. There will be some changes that have negative impact, but mostly positive results. As a manager it is your job to access those changes and make sure they are for the good of the employees and the company.

3. What question should a manager ask when determining the company's goals?
 - a) How can I advance my career?
 - b) How can my department help the company reach its goals?
 - c) Which employees can I fire?
 - d) What does my company sell?

A manager should be asking themselves, and their supervisors about the goals of the company. What is my company trying to accomplish? What are the company's short term and long term goals? What steps is the company wanting to take to accomplish these goals? How can my department help the company achieve those goals?

4. What can you do once you understand the goals of the company?

- a) You can decide who should get fired
- b) You can change everything to how you like it
- c) You can create a closed culture
- d) You can decide what goals your department needs

Once you understand the goals of the company you can decide how you and your department can help achieve those goals. A goal is like a recipe, and you have to follow the steps to achieve the goal.

5. Why should you train as if you were one of your employees?

- a) So that you can see who is slacking
- b) You don't need to train as if you were your employee
- c) So you can understand their procedures
- d) None of the above

Training as if you were one of your employees is a very important tool. This training helps you understand the processes, so you can see what is working and what doesn't. It also lets you get to know your employees and their habits. It creates an open culture, since the employees will feel like you don't think you're too good for them. There are lots of positives with this type of training.

6. From an employee's perspective, which of the following is a benefit of your supervisor understanding your job duties and processes?

- a) They can see how to improve the processes
- b) They can understand how unhappy the other supervisors are
- c) They can see who likes the company the most
- d) All of the above

For a manager to not know the duties and processes of an employee, makes it hard for the manager to know the expectations. With having the experience of their employee's jobs, they can see what needs to change to make happier employees, increase productivity, and customer satisfaction.

7. How does an education opportunity for employees help the company?

- a) The employees feel pressured to get a degree
- b) The employees feel like the company cares about them
- c) The employees feel like the company wants to get rid of them
- d) None of the above

An educational opportunity for employees shows that the company cares about the employee's personal growth. An employee that feels like the company cares about them, is happier, and gives better customer service.

8. Which of the following is not an example of an education opportunity?

- a) College tuition reimbursement
- b) Watching YouTube
- c) Cross Training
- d) Seminars & workshops

There are many opportunities for education that a company can give its employees. Cross training is an example of education, that could allow an employee advancement opportunity. College tuition reimbursement, and providing seminars and workshops are other examples of education opportunities.

9. A _____ sets the tone for the whole staff

- a) Contact Center
- b) Coworker
- c) Manager
- d) None of the above

A manager sets the tone for the whole staff

10. When you are a manager, it is important that you create an/a _____ with your staff.

- a) Relationship
- b) Open culture
- c) Family-culture
- d) None of the above

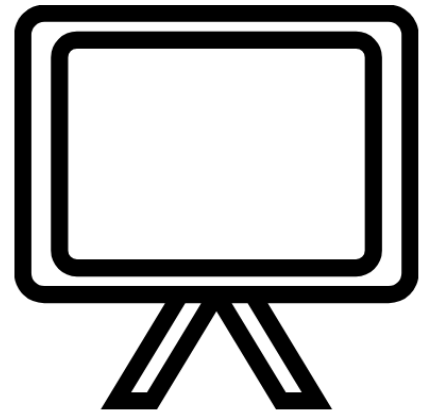
When you are a manager, it is important that you create an open culture with your staff.

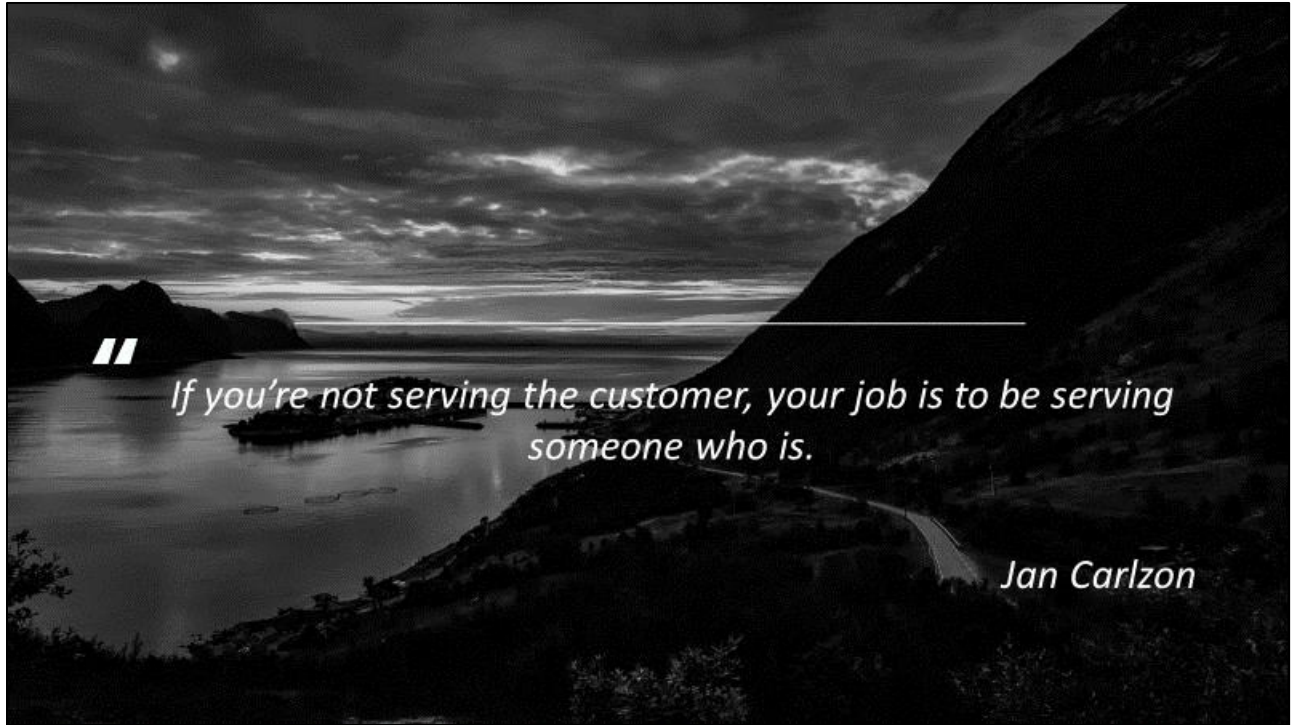
PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





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If you're not serving the customer, your job is to be serving someone who is.

Jan Carlzon

MODULE TWO

It Starts at the Top

You can help your staff be the best contact center possible by creating an open culture, knowing the goals of the company, knowing your employees' job duties, and being able to identify additional training opportunities.



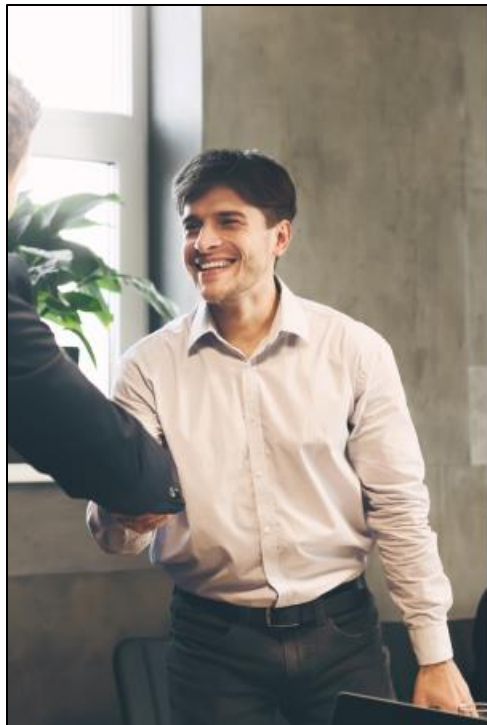
Create An Open Culture

- Lose the door
- Don't be secretive
- Conduct one-on-one training sessions

Understand Goals

- What is the company trying to achieve?
- What are the company's goals?
- How can my department help facilitate those goals?



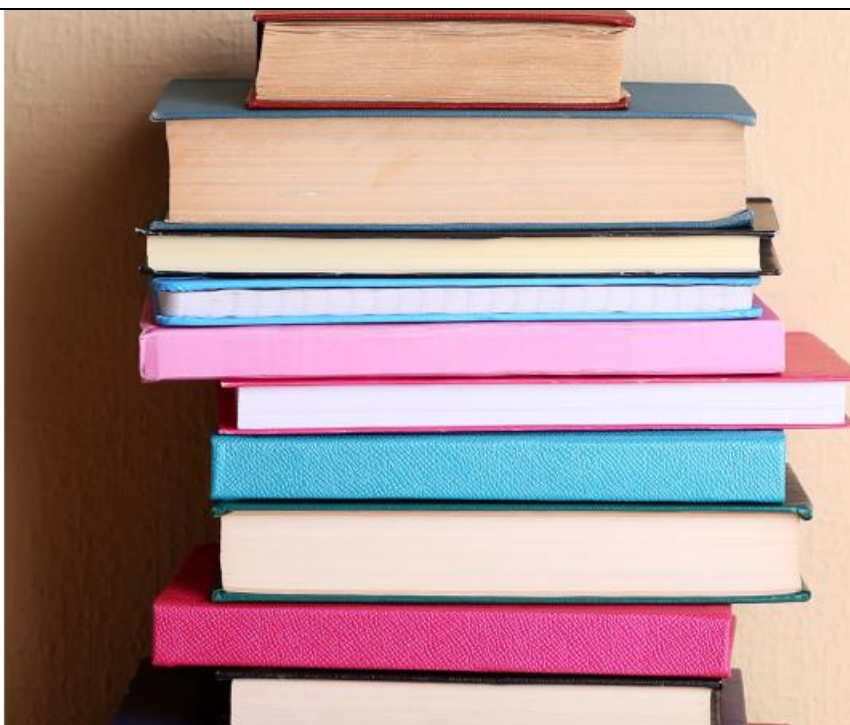


Understand Agent's Responsibilities

Take the time to talk to your supervisors so that you know what is expected of your employees.

Identify Education Opportunities

- Cross Training
- One-on-one Training
- Seminars & Workshops



Practical Illustration



- Create an Open Culture
- Understand Goals
- Understand Agents' Responsibilities
- Identify Education Opportunities

Module Two: Review Questions

1. What is an open culture?

A. Creating an environment where employees feel safe to express ideas or concerns

B. Creating a work space that has no walls, windows, or doors

C. Creating an environment where employees are discouraged to express ideas or concerns

D. None of the above

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Contact Center Training Quick Reference Sheet



Linear Thinking

Linear thinking involves step-by-step progression. A linear thinker expects one step to be addressed before moving on to the next step. This could be considered a logical way of thinking to ensure each piece of the puzzle properly fits into place so that no important detail is missed.

Although not everyone is a natural born linear thinker, this skill can be very helpful in getting to the root of, and resolving a customer service issue.

Common characteristics of linear thinkers:

Structure-based



Traditional



Like to implement solutions



Stick to the facts



Allow Customers to Talk

In a conversation, there is the person who talks, and the person who listens, that part is pretty basic. These roles can be interchangeable, but there is always someone who takes the lead on talking, in this context that should be the customer.

It is very common for a phone operator to become too focused on the task at hand and forget to use their listening skills. No one likes to be interrupted, so a contact center agent has to be patient. Customers who are constantly interrupted start feeling like they are being rushed, or that you are not invested in assisting them. You want to give the customer 100% of your attention, and make sure you are understanding their needs and feelings.

Sometimes you will get customers that just need to vent their frustrations, and sometimes you will get customers who have a hard time expressing their needs. Allowing the customer to finish talking, uninterrupted, will show them you value them as a customer and are ready and willing to help them.



Smile in Your Voice

One great way to start building rapport with your customers is by having a smile in your voice. No one wants to call and talk to a grumpy employee. Having a smile in your voice puts the customer at ease and makes them feel welcome to call. Also, having a smile helps your inflection on the phone. How do you keep a smile in your voice during a phone call?

- Answer the call with a smile, a real smile! A caller can hear your smile, and it will make you more genuine.
- Utilize a mirror to remind yourself to smile when you are taking a call.
- Have pictures around that bring a smile to your face.
- Remember to leave your baggage at the door, and keep yourself upbeat.



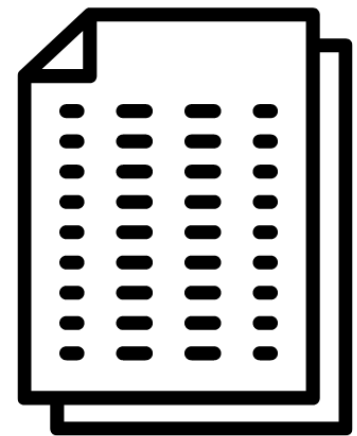
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 1

Education Opportunities

Use the lines below to list the different types of educational opportunities you could suggest for your staff. How would it benefit the employee? How would it benefit the company?

Educational Opportunity:	Employee Benefit:	Company Benefit:
1.) _____ _____	_____	_____
2.) _____ _____	_____	_____
3.) _____ _____	_____	_____
4.) _____ _____	_____	_____
5.) _____ _____	_____	_____
6.) _____ _____	_____	_____
7.) _____ _____	_____	_____
8.) _____ _____	_____	_____

Icebreaker: On the Spot

PURPOSE

1. To help participants get to know each other.
2. To give participants some practice with communication.

MATERIALS REQUIRED

Ball or soft toy

PREPARATION

Have participants stand in a circle. If you have more than 20 participants, divide the group into two or more.

ACTIVITY

Explain that this exercise is all about getting to know each other. You as the instructor will start by tossing the ball to someone and asking them a question. They will answer the question and then toss the ball to someone else, and ask a different question. (If participants are not familiar with each other, they may want to state their name, too.)

After the game has been going for about a minute, challenge participants to repeat a fact about another participant before they ask someone else a question.

If someone is not comfortable answering a question, they may pass.

Have each participant stand up, announce their name and character, and why they chose that character. Once all participants have had a chance to speak, ask them to write the name of a real person or movie character they would like to become more like onto the index card (this is their Goal Card).

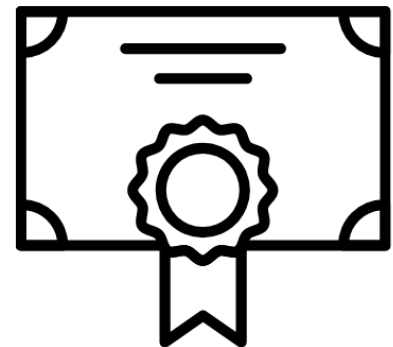
Have each participant stand up and explain who they chose and why. When they sit back down, have them place the Goal Card someplace visible in front of them to remind them of their goal.

[INSTRUCTOR'S NOTE: the self-identity and role model may well change during the class, and that's fine. You now have some valuable insight into who your participants are and what leadership skills they may already have.]

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
Contact Center Training*

Awarded this _____ day of _____, 20____

Presenter Name and Title
