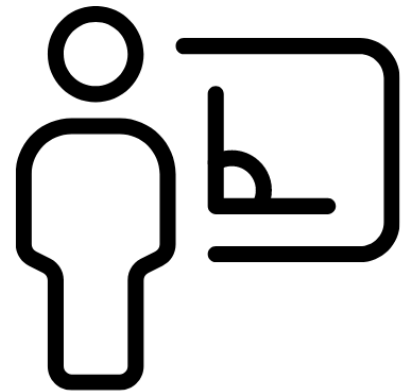


# Instructors Guide



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 get everybody in the company involved in customer service, not only are they “feeling the customer” but they’re also getting a feeling for what’s not working.*

*Alice MacDougall*

## Module Two: Who We Are and What We Do



Before we get started, we need to think about what is a customer? What customer service is all about? We also need to think about who in our organization provides customer service. The simple answer to that question is: everyone.

### Who Are Customers?



A customer is, in this day and age, anyone who uses a service. Although this has its logical extremes – you will find few people who are overjoyed by the idea of being a customer to a doctor, or their children a customer of their school. Therefore everyone who relies on you to do a job that will have an effect on their life, their job, or their use of a product, is technically one of your customers. Above and beyond that there are different echelons of customers – internal and external, corporate and personal, regular and occasional. These are always people that you will be well-advised to keep happy, so customer service is an important – indispensable, one might say – element of any job in which you have customers.

If, for example, you work in one branch of a department store, and receive a call from someone working in a sister branch of the same store wondering if you have in stock a particular item – one which their branch has run out of, for example, then that individual technically, and temporarily, becomes a customer to you. They want something and are hoping that you can deliver it. To do your job the way one would hope, you will go to whatever lengths are possible in order to provide the best service possible to whoever needs it from you.

Of course, the most regular customers tend to be the external customers who provide the "bread and butter" of any business, the regular, day-to-day custom that drives the profits and income of a company.

It is also these customers who will, by word of mouth, and other means, bring your business to the attention of other potential customers. Their role in a business's success is essential, and these customers should be the immediate concern of any business. Ensuring that these customers are satisfied will make the difference between success and failure for any company.

### **External Customers**

External customers are anyone outside your company that you interact with — not just the people who buy goods or services from you. External customers are what can be considered 'traditional' customers:

- They take our products and services and pay for them
- They exist 'outside' the confines of our own organization
- They are open to approach from our competitors
- They may not always be dependent upon us for products and services and may switch to our competitors

### **Internal Customers**

Internal customers include anyone in your organization who relies on you for services, resources, or information.

Providing excellent customer service to internal customers sets a positive tone for all personal interactions. If internal customers receive excellent customer service every day, they will consider this the norm. If they interact with external customers, they are likely to treat those customers the way they have been treated. Excellent customer service, like most types of human behavior, is contagious.

The quality of service you provide to internal customers ultimately affects the quality of service your company provides to external customers. Even if you never interact with someone outside your company, you are still engaged in customer service. An internal customer may look for any of the following:

- Materials
- Information
- Instruction
- Participation
- Assistance

Internal customers are the people in our own organization who are dependent on us; without us they cannot perform their tasks to maximum efficiency, and this has either a direct or an indirect effect on the external customer.

<b>Estimated Time</b>	20 minutes
<b>Topic Objective</b>	To gain a broader understanding of who our customers are.
<b>Topic Summary</b>	Customers are all the people we interact with, both inside and outside our organization.
<b>Materials Required</b>	None
<b>Planning Checklist</b>	<p>Write two headings on flip chart paper.</p> <ul style="list-style-type: none"> <li>• External Customers</li> <li>• Internal Customers</li> </ul>
<b>Recommended Activity</b>	<p>External customers are anyone outside your company that you interact with — not just the people who buy goods or services from you.</p> <p>Ask participants to brainstorm a list of external customers. Write their responses on a flip chart.</p> <p>Internal customers include anyone in your organization who relies on you for services, resources, or information.</p> <p>Discussion topic: Why call these people customers? Aren't they just coworkers?</p> <p>Ask participants to brainstorm a list of internal customers. Write their responses on a flip chart.</p>
<b>Ideas to Share</b>	<p>Providing excellent customer service to internal customers sets a positive tone for all personal interactions. If internal customers receive excellent customer service every day, they will consider this the norm. If they interact with external customers, they are likely to treat those customers the way they have been treated. Excellent customer service, like most types of human behavior, is contagious.</p>
<b>Delivery Tips</b>	<p>In discussing the concept of internal customers, explain that they form part of the “customer chain.” The quality of service you provide to internal customers ultimately affects the quality of service your company provides to</p>

	external customers. Even if you never interact with someone outside your company, you are still engaged in customer service.
<b>Review Questions</b>	In ten words or less, answer this question: Who are customers?

## What Is Customer Service?



Customer service is one of the true business essentials. Everyone remembers the bad customer service they have had, and most will also remember instances of good customer service. The importance of customer service is recognized by all successful businesses, because it is possibly the number one element in customer retention. If you want to ensure that you get repeat business, looking out for the wishes and needs of your customer base is essential. How you go about providing it is up to you, but there are certain elements which remain the same whatever the nature of your business. These are the principles of good customer service.

Whenever a customer makes a purchase, they will have priorities as to what makes their experience a positive one. Obviously the first priority is that they get whatever they have purchased from the point of purchase to their home. If it is a small item that they can take with them, the business's responsibility is to see to it that the item is packaged and presented in a manageable, portable fashion with a minimum of waiting. However, customer service begins before this. When a customer enters the store or the showroom to find what they are looking for, they may require the attention of staff to enable them to find it. Some customers just want to browse. Staff is required to ascertain what a customer wants, how they want to go about it, and whether they will need any help.

Customer service can be defined as any action you take to ensure that a customer is pleased with the transaction on a long-term basis. This includes "after sales service", which entails ensuring that the customer leaves the point of sale with the item that they were looking for, within the period of time that they intended to spend sourcing it, and then has no problems using it. It is easy enough to ensure a customer goes away from the point of sale with the item they had come to purchase. Ensuring that they are happy going forward may require more care and attention, and this is where after-sales service needs to be at its highest level. Pre-sales, after sales and point-of-sale service are all essential elements of customer service.

<b>Estimated Time</b>	15 minutes
<b>Topic Objective</b>	To gain a broader understanding of what is involved in customer service
<b>Topic Summary</b>	Excellent customer service involves making every interaction with customers as positive an experience as possible.

<b>Materials Required</b>	None.
<b>Planning Checklist</b>	Write two headings on flip chart paper: <ul style="list-style-type: none"> <li>• Great customer service</li> <li>• Awful customer service</li> </ul>
<b>Recommended Activity</b>	Ask participants to think of a time when they received excellent customer service. Ask them to briefly describe the experience. What words would they use to describe the service? Write their responses on a flip chart.  Ask participants to think of a time when they received awful customer service. Ask them to briefly describe the experience. What words would they use to describe the service? Write their responses on a flip chart.
<b>Stories to Share</b>	Dee Hock, the founder of VISA, gave his employees this advice:  Make a list of all the things done to you that you abhorred. Don't do them to others. Ever. Make another list of things done to you that you loved. Do them to others. Always.
<b>Delivery Tips</b>	Ask participants to keep their customer service stories brief so that there will be time to hear from several people.

## Who Are Customer Service Providers?



Given the importance of customer service, it will inevitably be the case that any company will have to place a strong focus on ensuring that the people within the business do their jobs as required. Any commercial enterprise may have several layers of staff responsibility, and the jobs done by these members may vary considerably. What they all have in common is their importance to a business lies in their ability to do what is required, and how it should be done. Just about anyone can get one of these elements right, and most will be able to do two. Customer service providers have to get all three.

In any business, a customer service provider is someone whose performance of their role is important to the overall result for the customer. Most customers will not care much for what happens behind the scenes in a company, so long as they are able to count on their needs being fulfilled. It is therefore the focus of every member of staff to see to it that their job is done without it being necessary for urgent action to be taken. The element of customer service that most customers will notice in any given transaction is that which happens in full view – how the sales people speak to them and how their enquiry is dealt with. But to get to that point, a number of other things also need to be done correctly.

It could be argued that every member of staff within an organization has an element of customer service provision within their responsibilities. It may be something as simple as ensuring that stock is placed where it needs to be placed. It may be something that appears to be entirely divorced from the sales service, such as the work of a security guard who ensures that the store is secure at all times so that everything runs smoothly. One way or another, all of these will impact on the customer experience, and getting it wrong will mean that a company is failing to provide customer service at the level that is expected of them.

<b>Estimated Time</b>	15 minutes
<b>Topic Objective</b>	To gain a broader understanding of who provides customer service
<b>Topic Summary</b>	Everyone in an organization provides customer service, either to internal or external customers.
<b>Materials Required</b>	None
<b>Planning Checklist</b>	To save time, write a list of job titles like the one below on flip chart paper.
<b>Recommended Activity</b>	<p>Ask participants to break into small groups. Ask each group to think of a type of employee not usually associated with customer service. How can these employees affect interactions with external customers? Ask each group to report on their discussion.</p> <p>If participants have trouble thinking of a type of employees for this activity, they can choose from this list:</p> <ul style="list-style-type: none"> <li>• Maintenance staff</li> <li>• Security guards</li> <li>• Website staff</li> <li>• Purchasing staff</li> </ul>
<b>Delivery Tips</b>	If some types of employees on the above list have not been addressed, lead a discussion about how they might contribute to customer service.

## Practical Illustration



Dave was applying for a customer service job at a paper distribution company. Before he sent in his application, there was a short test he had to complete. The test was on the ins and outs of the company. Dave was able to easily recall the information on the types of customers. The internal ones are buyers within the company, and the external ones are from outside the company. Dave was accepted into the job, and he used his skills in customer service to help promote the business. He was always kind and honest when helping customers, and he did his job in the most efficient way possible.



## Module Two: Review Questions

1.) Regular day-to-day, traditional customers are generally called?

- a) Internal customers
- b) Competitors
- c) Colleagues
- d) External Customers

The most regular customers tend to be the **external** customers who provide the "bread and butter" of any business, the regular day-to-day custom that drives the profits and income of a company.

2.) A colleague looking for information would be considered an internal customer?

- a) True
- b) False

True: Internal customers include anyone in your organization who relies on you for services, resources, or information.

3.) Anyone who uses a service is a \_\_\_\_\_?

- a) Supplier
- b) Customer
- c) Business partner
- d) Supervisor

A customer is, in this day and age, anyone who uses a service.

4.) \_\_\_\_\_ is any action you take to ensure that a customer is pleased with the transaction on a long-term basis.

- a) Point of sale
- b) Customer service
- c) Customer retention
- d) Business essentials

Customer service can be defined as any action you take to ensure that a customer is pleased with the transaction on a long-term basis.

5.) When is the best time to provide great customer service?

- a) At the point of sale
- b) Pre-sale
- c) After sales service
- d) All of the above

Any time is the best time to deliver great customer service.

6.) A security guard in your office can affect external customer service.

- a) True
- b) False

True: It could be argued that every member of staff within an organization has an element of customer service provision within their responsibilities, such as the work of a security guard who ensures that the store is secure at all times so that everything runs smoothly.

7.) Who in an organization provides customer service?

- a) Sales people
- b) The owner
- c) The maintenance team
- d) All of the above

We also need to think about who in our organization provides customer service. The simple answer to that question is: **everyone**.

8.) A person's livelihood, or main source of income, is referred to in this module as:

- a) Peanut butter and jelly
- b) Bread and butter
- c) Dessert
- d) None of the above

Bread and butter is an idiom meaning a person's livelihood/income.

9.) A/an \_\_\_\_\_ provider is someone whose performance of their role is important to the overall result for the customer.

- a) Internet
- b) Health care
- c) Customer service
- d) All of the above

A customer service provider is someone whose performance of their role is important to the overall result for the customer.

10.) How can 'word of mouth' affect your company?

- a) Negatively
- b) Positively
- c) Neutrally
- d) All of the above

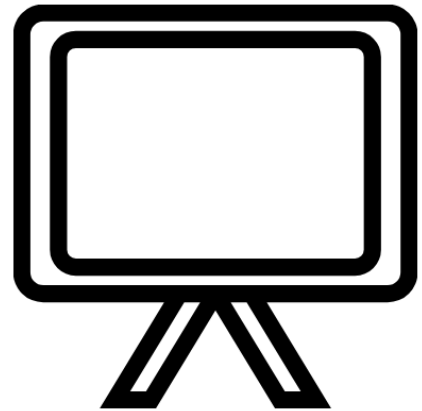
Regular, day-to-day customers, are the customers who will, by word of mouth, (orally communicating) and other means, bring your business to the attention of other potential customers.

# 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.





“

*If you get everybody in the company involved in customer service, not only are they “feeling the customer” but they’re also getting a feeling for what’s not working.*

*Alice MacDougall*

## MODULE TWO

# Who We Are and What We Do

What is customer service all about? Who in our organization provides customer service. The simple answer to that question is: everyone.



## Who Are Customers?

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Anyone who relies on you to do a job that will have an effect on their life, their job, or their use of a product, is technically one of your customers.

## What is Customer Service?

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Everyone remembers bad customer service, and most remember good customer service.





## Who Are Customer Service Providers?

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Any company will place a strong emphasis on ensuring that the people within their business do their jobs as required.

### Practical Illustration



- Who Are Customers?
- What is Customer Service?
- Who Are Customer Service Providers?

## Module Two: Review Questions

1. Regular day-to-day, traditional customers are generally called?

A. Internal customers

B. Competitors

C. Colleagues

D. External customers



# 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.



# Customer Service Quick Reference Sheet



## Going the Extra Mile

Once you have met that customer's basic needs, what could you do to show that you are committed to providing the best service possible?



Try these simple tasks where applicable:

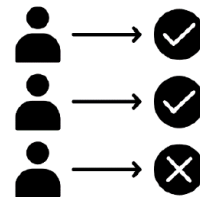
- Remember someone's name and use it frequently in conversation
- Remember what someone has purchased
- Learn your customers' likes and dislikes
- Contact your customers regularly
- Put their needs high on your priority list
- Inform customers of specials and sales
- Be available to meet their needs
- Follow up when you say you will
- Be organized and thorough
- Return customer calls promptly

## The Seven Situations of Difficult Customers

1. You don't know the answer to a customer's question (Tell the customer that you don't know the answer, but you will find out)
2. You have to say no to a customer's request (Explain why you have to say no; offer alternatives)
3. Your computer is working slowly and the customer is getting impatient (Tell the customer your computer is working slowly; keep the customer informed about what's happening)
4. The customer makes an unrealistic request (Explain what alternatives you can offer)
5. The customers don't seem to believe you (Offer to show proof or backup information)
6. The customer is angry (Stay calm; acknowledge the customer's feelings)
7. The customer doesn't want to give you the information you need (Explain why you need the information)

## Customer's Bill of Rights

- To be taken seriously
- To be listened to
- To be respected
- To receive a quick response



## Telephone Etiquette

- Answer promptly, on the third ring at the latest.
- Before you pick up the phone, end any conversation you are having.
- Greet the caller, identify yourself, and ask if you can help.
- Speak clearly in a pleasant tone of voice. Avoid speaking too quickly.
- Give the caller time to explain the reason for the call. Don't interrupt. Don't sound like you're in a hurry.
- When you need to put someone on hold, ask first: "Can I put you on hold for just a minute?" After you return to the line, thank the customer for holding.
- If you need to transfer a call, explain what you're doing.
- When you end a call, let the customer hang up first. This will ensure that you don't cut the customer off prematurely.



## Meeting Basic Needs

1. **Friendliness** - Friendliness is the most basic of all customers needs, usually associated with being greeted graciously and with a smile. We all want to be acknowledged and welcomed by someone who is glad to see us. A customer should never feel they are an intrusion on your work day.
2. **Understanding and empathy** - Customers need to feel that you understand and appreciate their circumstances without criticism or judgment.
3. **Fairness** - We all need to feel we are being treated fairly. Customers may get annoyed and defensive when they feel they are subject to unfair treatment.
4. **Control** - Control represents the customers' need to feel they have an impact on the way things turn out.
5. **Options and alternatives** - Customers need to feel that other avenues are available to getting what they want accomplished. They realize that they may be in uncharted waters, and they depend on us to be "in the know".
6. **Information** - Customers need to be educated and informed about our products and services, and they don't want us leaving anything out!

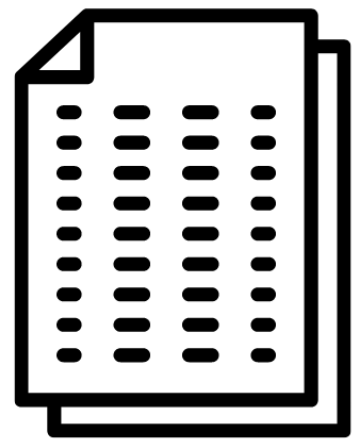
# Handouts



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.



## **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.)

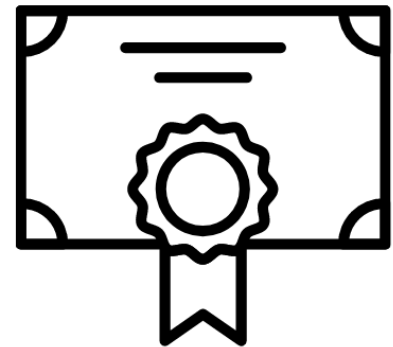
After the game has been going for about a minute, challenge participants to repeat a fact about another participant before they ask someone else a question.

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

# 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*  
***Customer Service***

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_