



Providing Quality Service

Customer Service Excellence

Participant Training Manual

Comprehensive Public Training Program



Rev. 03/21/2016

PROVIDING QUALITY SERVICE

COURSE DESCRIPTION

This training allows participants to improve customer service skills by learning and applying useful strategies for handling customer interactions and managing customer relationships.

JOB/LEARNING OUTCOMES

- Identify and implement the practices of outstanding customer service.
- Apply effective communication skills to develop strong customer relationships.
- Manage difficult situations with consideration and respect.

WHAT IS GREAT SERVICE TO YOU?

We are customers every single day, so we have a good idea what great customer service is. What is it to you? Use the space below to write words and phrases that describe your perfect customer service experience, as well as notes from the experiences of your classmates.

INSIGHTS AND OBSERVATIONS

Use the area below to record insights, ideas, and customer service discoveries from today's session. When you come back from lunch, add any observations you made of customer service interactions, personality types, or other notes from your time away from the workshop.

QUALITY SERVICE ASSESSMENT

Next to each behavior listed below, circle the number that indicates how frequently you act or respond in these ways. Total your score for each section.

1 = Never 2 = Seldom 3 = Sometimes 4 = Often 5 = Almost Always

Receive

- | | | | | | |
|---|---|---|---|---|---|
| 1. I greet customers in a positive manner every time. | 1 | 2 | 3 | 4 | 5 |
| 2. If a customer is angry with me or has a negative attitude, I go out of my way to give that person good service. | 1 | 2 | 3 | 4 | 5 |
| 3. I maintain my documentation, records, and equipment so that I am able to locate information quickly and efficiently. | 1 | 2 | 3 | 4 | 5 |
| 4. I am successful at finding ways to put customers at ease. | 1 | 2 | 3 | 4 | 5 |
| 5. I appreciate customers for working to address health and environmental issues. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

Understand

- | | | | | | |
|---|---|---|---|---|---|
| 6. I use active listening to ensure that I understand my customer's questions and concerns. | 1 | 2 | 3 | 4 | 5 |
| 7. I ask questions and paraphrase important requests to ensure that the customer understands. | 1 | 2 | 3 | 4 | 5 |
| 8. I am able to step into my customer's shoes to understand his/her point of view. | 1 | 2 | 3 | 4 | 5 |
| 9. I maintain a positive and approachable manner, even at difficult times. | 1 | 2 | 3 | 4 | 5 |
| 10. Whenever possible, I offer assistance to my customers and coworkers. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

Help

- | | | | | | |
|--|---|---|---|---|---|
| 11. I am open and positive about feedback and new ideas. | 1 | 2 | 3 | 4 | 5 |
| 12. I offer my customers options whenever possible. | 1 | 2 | 3 | 4 | 5 |
| 13. I try to get my customer's agreement on the next steps to be taken. | 1 | 2 | 3 | 4 | 5 |
| 14. I apologize for errors, whether or not I was responsible for them. | 1 | 2 | 3 | 4 | 5 |
| 15. If I get a customer question or request that is not in my area of expertise, I ensure that he or she gets to the right person. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

Keep

- | | | | | | |
|---|---|---|---|---|---|
| 16. I follow through on commitments and responsibilities. | 1 | 2 | 3 | 4 | 5 |
| 17. I follow up by calling a customer to see if a problem or issue was resolved. | 1 | 2 | 3 | 4 | 5 |
| 18. I work to find ways to give my customers outstanding service. | 1 | 2 | 3 | 4 | 5 |
| 19. I ask if there is anything else I can do, even if the transaction is finished. | 1 | 2 | 3 | 4 | 5 |
| 20. I help my customers improve their future experiences through positive education, enlightenment, and persuasion. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

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RECEIVE UNDERSTAND HELP KEEP

The four areas listed below represent the stages of our customer interactions. We'll be studying ways we can be more effective in each of these stages today.

Use this form, together with your Customer Service Assessment, to note important points that you want to remember about our discussion on the parts of quality customer service.

<p>RECEIVE</p> <p>What do I do to make a customer feel welcome and valued?</p>	
<p>UNDERSTAND</p> <p>How do I walk in my customers' shoes?</p>	
<p>HELP</p> <p>What helps me move past challenges and find solutions?</p>	
<p>KEEP</p> <p>What can I do to ensure that the next interaction with this customer will be even more positive?</p>	

A QUICK LOOK AT PERSONALITIES

Look at the items below and put a check mark in the box of each statement that sounds like you.

This is not an official personality assessment. It's a personality snapshot to give you a chance to see what traits you have in common with your internal and external customers.

⇒ Don't overthink this! Look at each item and respond with your first impression.

⇒ Check every item that sounds like you, no matter which box it's in.

⇒ Don't worry about how many check marks you have.

⇒ Add up the number of checks in each box and put them in the space on the top line.

<p style="text-align: center;">_____ Number of checks _____</p> <ul style="list-style-type: none"> <input type="checkbox"/> Give me the facts I need, not a lot of details. <input type="checkbox"/> Let me be in charge and I'll get things done. <input type="checkbox"/> I am seen as confident by those who work with me. <input type="checkbox"/> I have an assertive manner. <input type="checkbox"/> I have no problem voicing my opinion. <input type="checkbox"/> I don't mind taking risks. <input type="checkbox"/> I enjoy competition. <input type="checkbox"/> I am good at making decisions. <input type="checkbox"/> Don't bring me a problem unless you want it solved. 	<p style="text-align: center;">_____ Number of checks _____</p> <ul style="list-style-type: none"> <input type="checkbox"/> I like to motivate and inspire people. <input type="checkbox"/> I am described as a people-person. <input type="checkbox"/> I am enthusiastic and optimistic. <input type="checkbox"/> I like brainstorming and sharing ideas. <input type="checkbox"/> I don't like it when people don't give me an opportunity to talk. <input type="checkbox"/> I don't enjoy detail work. <input type="checkbox"/> I can be impulsive and emotional. <input type="checkbox"/> I am a good mixer in groups and social situations. <input type="checkbox"/> I am most likely to say, "Let's have fun with this!"
<p style="text-align: center;">_____ Number of checks _____</p> <ul style="list-style-type: none"> <input type="checkbox"/> I take the time to do things right. <input type="checkbox"/> I enjoy working independently. <input type="checkbox"/> I am cautious and logical in my thinking. <input type="checkbox"/> I listen more than I talk. <input type="checkbox"/> I prefer things "by the book". <input type="checkbox"/> I am good at determining whether a plan will work or not. <input type="checkbox"/> I prefer order and predictability. <input type="checkbox"/> I pay attention to details. <input type="checkbox"/> Slow down and give me time to analyze information. 	<p style="text-align: center;">_____ Number of checks _____</p> <ul style="list-style-type: none"> <input type="checkbox"/> I help to create a cooperative team atmosphere. <input type="checkbox"/> I am described as patient. <input type="checkbox"/> I am reliable and supportive of others. <input type="checkbox"/> I am a good listener. <input type="checkbox"/> I enjoy a consistent routine. <input type="checkbox"/> I want to understand where my role fits into the big picture. <input type="checkbox"/> I sometimes find myself in the role of "therapist". <input type="checkbox"/> I am sensitive to the feelings of others. <input type="checkbox"/> I need some time to adjust to changes.

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PERSONALITY AND CUSTOMER TYPES

Use this space to write down **characteristics** of each personality type.

Director	Communicator
Analyst	Team Player

Use this space to compile a list of **strategies** for working effectively with customers of each personality type. You'll get additional information from the Personalities and Communication handout, your own personal experiences, and group discussions.

Director	Communicator
Analyst	Team Player

IDEAS FOR COMMUNICATING WITH DIFFERENT PERSONALITIES

Suggestions for communicating with these personality

Suggestions from discussion and personal experience

DIRECTOR

- Get to the point.
- Don't try to "sell" me on ideas. Just give me the facts.
- Give me definite deadlines and outcomes.
- Don't micromanage me.
- Don't give a lot of extra details. Just tell me what I need to know.
- Don't keep talking once I've shown that I understand what you're saying.

COMMUNICATOR

- Acknowledge me as an individual.
- Don't go too long without allowing me an opportunity to speak.
- Keep communications positive and upbeat.
- Help me organize my thoughts so I can ask the questions I need and understand the answers.
- Allow me to express my sense of humor.

TEAM PLAYER

- Use a friendly approach to connect with me as a person.
- Don't be confrontational or aggressive with me.
- Take the time to explain changes and why they are being made.
- Notice if I get quiet or withdrawn and help me to communicate my problem.
- Follow up our conversation with additional communication and support.
- Take time to empathize with me when there's a challenge.

ANALYST

- Bring me specific facts and details.
- Keep it professional.
- Do not change the process we're using unless you explain why.
- Do not interpret my analytical way of thinking as negative.
- Give me time to review information so I can understand and accept changes.
- Give me pros and cons so that I can make an informed decision.

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CREATING CUSTOMER SERVICE MEMORIES



Group Activity

Use these spaces to list ideas for creating positive experiences with each form of communication.

Face to face Communication:	Telephone Communication:	Written Communication:

FOR FURTHER THOUGHT...

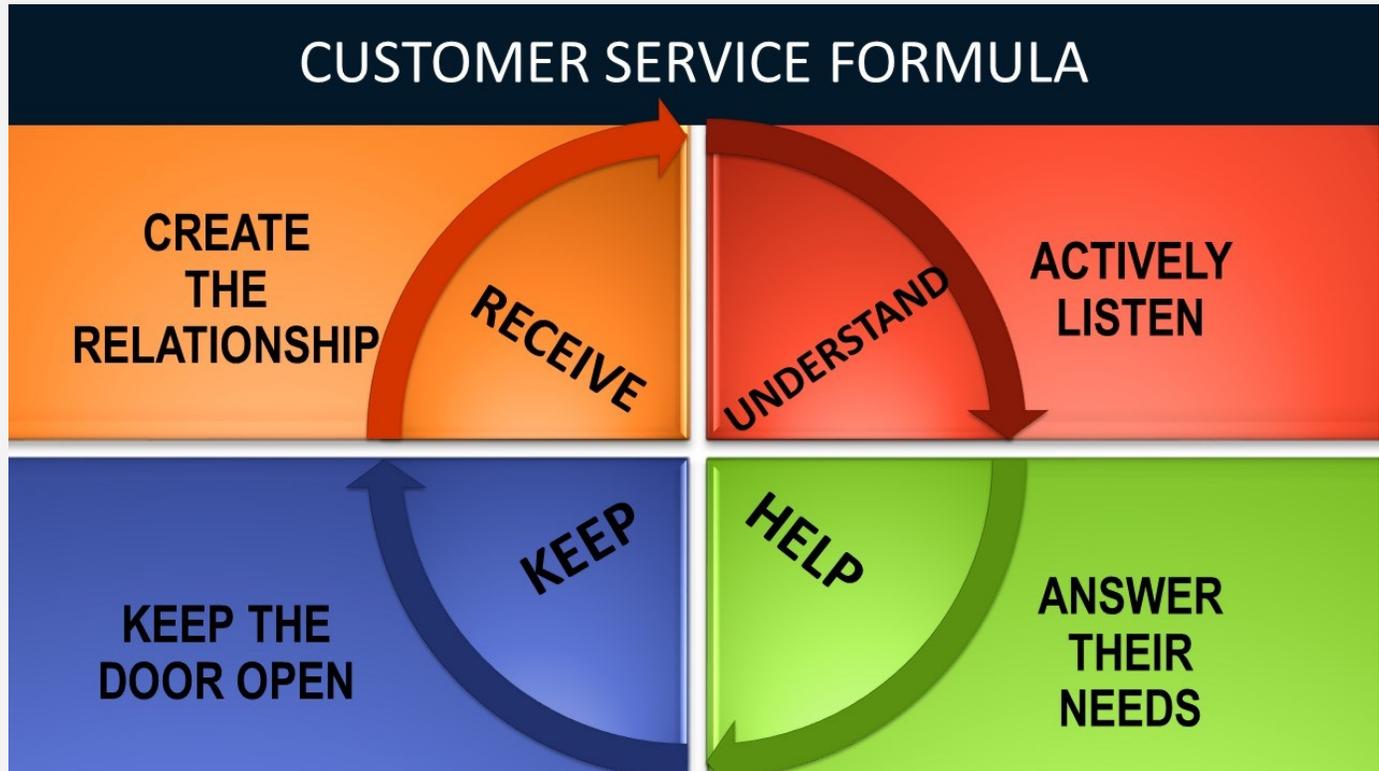
1. Give one specific example of how you provide internal customer service in your agency.
2. Using the ideas above, how could you improve this service?

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CUSTOMER RELATIONSHIP MANAGEMENT

Managing customer relationships effectively requires time and practice to take your customer service skills to the next level. There are four basic steps to keep in mind.

THE 4 STEPS OF THE CUSTOMER SERVICE FORMULA



PRACTICE SESSION

1. Conduct this activity with a partner.
2. Use the four steps of Receive, Understand, Help, and Keep to meet customer's basic needs.
3. Be creative!

CUSTOMER ROLE: You are a tourist today, but you have been considering moving to Louisiana for a fresh start. You are unsure how well you would fit in here, though. You have a few questions about the culture, the geography, the weather conditions, opportunities, and the overall "feel" of the state.

EMPLOYEE ROLE: As an employee of the state, you know that everything you say and do is a direct representation of Louisiana. When you're approached by this tourist, you're proud to represent your great state. Use the strategies discussed in class to make your customer feel welcome, understood, valuable, and comfortable while promoting your state.

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ELIMINATING RED FLAG STATEMENTS

Red Flag Statements make us “see red!” What are some statements that you do not like to hear when you are a customer? What could a customer service professional say instead of that Red Flag Statement?

RED FLAG STATEMENTS

REPLACEMENT STATEMENTS

THE LAST FORMULA YOU'LL EVER NEED FOR DIFFICULT SITUATIONS



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UNHAPPY CUSTOMERS

Despite our best efforts, we will have unhappy customers and difficult situations. Watch the difficult situation video closely and answer the questions below:

How could you tell the customer was unhappy?

What did the employee do well or poorly in this situation?

What can we do if we're working with an angry customer who is becoming aggressive?

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Wow! THE CUSTOMER

When we take quality service to its highest level, we've reached the point where we have an opportunity to "Wow!" our customers.



GROUP ACTIVITY

1. Take the situation on your Wow! Card and read it aloud to the group.
2. Your first task is to come up with as many ideas as possible to make this interaction positive for the customer. Brainstorm on this by asking: If this situation happened in my office tomorrow, how could I use the tools we've discussed today to "Wow!" this customer?
3. Now, review all of your group's ideas and select one that you consider the best.
4. When time is called, be ready to share your situation and your Wow! idea.
5. Make note below of any ideas you hear during this discussion that could be adapted to your department.