

---

**Level 1 Introductory Certificate in  
Customer Service**

**7014-14-014**

**TUTOR NOTES**

**City &   
Guilds**

## Workshop Materials

---

The Training Pack is made up of three main sections:

- Tutor Notes.
- Delegate Workbook.
- Slides.

Each of these sections will provide you with the information and materials needed to run the training sessions.

### Tutor Notes

The Tutor Notes are a guide to the information to be covered during the Workshop by the Tutor.

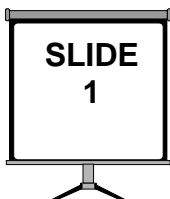
Timings of each session are a guide and may differ slightly depending on the needs of each group. Breaks should be taken as appropriate to the time of day.

Tutor Notes identify:

- What is to be explained/discussed by tutor.
- Activities to take place.
- Individual or syndicate exercises.
- Part of Delegate Workbook/Slide to support each session.

A visual is used to indicate what needs to take place.

e.g.  show slide 1.



## Workshop Materials

---

### **Delegate Workbook**

Please take a master copy of the Handouts. Make sure you print sufficient numbers of each Handout ready to give to each delegate. Remember to guide delegates through the recommended implementation ideas, for implementation of knowledge back in the workplace.

### **Microsoft PowerPoint slideshow**

A Microsoft PowerPoint slideshow is provided covering the key points of the relevant module. Use these slides to support the learning. Those centres that wish to use acetates may alter the colour scheme so it is more appropriate for acetate projection, as long as none of the content is altered or deleted. The text should not be altered or deleted because delegates are tested on the content of the support material. Any alteration could seriously affect a delegate's ability to successfully undertake the test. As with all City & Guilds materials the content of the slide remain copyrighted to City & Guilds even if the colour scheme is altered.

### ***Other Equipment/Materials***

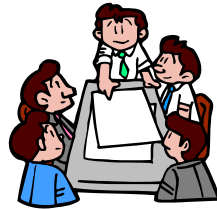
If other equipment is needed during the workshop, this is indicated within each of the relevant sessions.

## Key to Tutor Notes

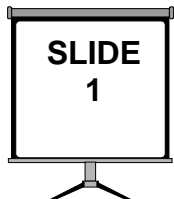
**Flip-chart**



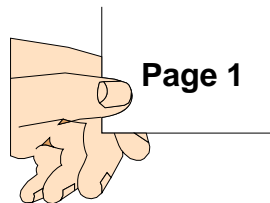
**Syndicate Exercise**



**Slides**



**Delegate Workbook**



**Breaks**



# Tutor Guidelines

---

## Introduction

The emphasis throughout the workshop is on "learning by doing" and is highly participative. Most of the activities are designed to help participants find their own way and identify what, for them, are the important learning points.

The delivery of the sessions is therefore crucial. Helping individuals interpret and apply their learning, as well as encouraging them to risk making changes and confront their own behaviour, requires sensitive and involved training.

## Timings

The timings given are guidelines and you will want to adapt them according to the needs of the group. There will be areas where groups need, and wish, to spend more time on, than others.

## Preparation

The Workshop requires the following materials to be prepared:

- PowerPoint slides.
- Delegate Workbook.
- Select suitable examples for each module, related to the delegates own workplace.
- Exercise briefs.
- Evaluation sheet.

## Tutor Guidelines

---

### Workshop Objectives

This is a **knowledge-based programme**, enhanced with practical training exercises that require further development back in the workplace.

**Please see the City & Guilds statement relating to employer support in the front of the Delegate Workbook.**

By the end of the programme delegates will have the knowledge to:

1. Demonstrate an understanding of the importance of the provision of good customer service in all sectors.
2. Identify customer and organisational needs and expectations in respect of service levels delivered in all businesses.
3. Describe the differences between strong and weak customer care, particularly relating to a professional image, communication skills and complaint handling.
4. Recognise how to present a professional image and identify techniques for communicating positively and effectively with customers, including verbal and non-verbal communications.
5. Identify the techniques used to handle customer complaints appropriately.

## Workshop Outline

---

Time	Length of session	Module
9.00	20 minutes	<b>Introduction and Overview</b>
9.20	1 hour 25 minutes	<b>Section 1 Introduction to Customer Service</b>  What is customer service? Why is service important? Who are your customers? What you can personally do to promote good customer service? Identifying customers needs and expectations Creating a safe working environment
10.45	15 minutes	<b>Break</b>
11.00	1 hour 45 minutes	<b>Section 2 Effective Communications</b>  Effective and ineffective Communications Questioning and Listening Techniques Telephone Techniques
12.45	45 minutes	<b>Lunch</b>

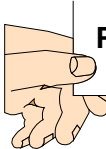
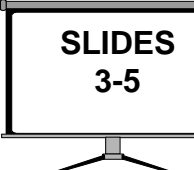
## Workshop Outline

---

Time	Length of session	Module
13.30	1 hour 30 minutes	<b>Section 3 Presenting a Positive Professional Image</b>  First impressions Presenting a positive attitude Presenting a professional image Identifying and using customer friendly body language Understanding personal space.
15.00	15 minutes	<b>Break</b>
15.15	1 hour 30 minutes	<b>Section 4 Handling Customer Complaints</b>  Why customers complain Resolving difficult customer situations Handling complaints positively.
16.45	15 minutes	<b>Break</b> Prepare room for test.
17.00	1 hour	<b>Examination. 40 Multiple-choice questions (2 options)</b> Ensure all questions are fully read through by all delegates and they are advised to double-check their answers before handing in the test paper.
18.00	15 minutes	<b>Evaluation</b> Collect evaluation



## Introduction to Workshop

Key Point	Content	Support/Notes
<b>Introductions</b>	<p>Welcome everyone to the Workshop – Introduce yourself.</p> <p><b>Cover Domestics</b></p> <ul style="list-style-type: none"> <li>• Breaks, Lunch, Timings, Mobiles off, Fire Exits, Toilets, Smoking Policy etc.</li> </ul> <p><b>Explain why we carry out this type of training:</b></p> <ul style="list-style-type: none"> <li>• Maintain professional image.</li> <li>• Be competitive in the market place – differentiate on service.</li> <li>• Need for everyone to be customer focused.</li> <li>• Develop the service skills of everyone who comes into contact with customers – both internally and externally.</li> </ul> <p><b>Give out Delegate Workbook/Handouts</b> Explain it is theirs to keep – to refer to – to make any notes in.</p> <p><b>Explain and Discuss the Workshop Objectives – Benefits to the delegates</b> Show and discuss Slide 3 – Objectives.</p> <p><b>Explain how the day will run</b> Run through Key areas in introductory part of Delegate Workbook, using Slides 4-5 as back up.</p> <p><b>Explain Style</b> Practical – Participative – Group Activities – Commitment to Action/Test.</p>	<p> <b>Pages 1-9</b></p> <p></p>

Key Point	Content	Support/Notes
<b>Introductions</b>	<p>Using pre-prepared cards, with some sort of visual or word on it, ask each person to take one.</p> <p><b>Note</b> These should be prepared beforehand - it is purely a way of getting people to pair up. Make sure you have enough cards for the whole group to enable them to pair up, eg 2 reds, 2 greens, 2 blues, 2 yellows or joining words, eg 2 monkeys, 2 horses, 2 dogs, 2 cats.</p> <p>Ask them to locate their matching pair and then find out the following information and introduce them using these facts:</p> <ul style="list-style-type: none"><li>• Who is the person? What do they do? What sector/industry do they work in?</li><li>• What is their experience of dealing with customers?</li><li>• Anything they would like to achieve from the day.</li></ul> <p><i>(You may want to write this on the flip-chart.)</i></p>	Cards with visuals
<b>Listen</b>	<p>Listen to all the feedback before summarising.</p> <p><b>Note</b> The summary will depend on how the pairs have approached the exercise.</p>	



## Section 1 Introduction to Customer Service

Key Point  
Section 1

Content  
Aims

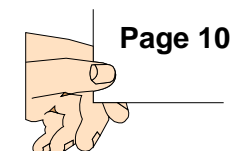
Support/Notes

At the end of this section delegates should be able to:

- Describe customer service.
- Explain why customer service is important to the success of organisations.
- Identify who their customers are.
- Identify the drawbacks of poor customer service.
- Explain how to promote good service.
- Demonstrate an understanding of customer service needs and expectations.

### Indicative Content

- 1.1 Outline knowledge of basic principles - maintaining good customer service at all times; treating all customers with respect; identifying and meeting customer needs; providing the service expected by the company.
- 1.2 Understanding why customer service is important to the company and to you – it helps to make the organisation successful, generates repeat business, assists profit and growth.
- 1.3 Identifying external and internal customers and their importance to the organisation.
- 1.4 Appreciate the drawbacks of not serving internal and external customers effectively eg poor reputation, loss of business, loss of profit, loss of jobs.
- 1.5 Overview of your own role in customer service including own and company's image, meeting legal obligations, practising good communication skills, solving problems appropriately.
- 1.6 Identifying the typical customer needs and expectations good practice in meeting these in a variety of situations.
- 1.7 Gaining insight into employer and employee responsibilities in relation to achieving a hygienic, safe and healthy environment for customers, including an understanding of local and national legislation relating to health and safety.



## Section 1 Introduction to Customer Service

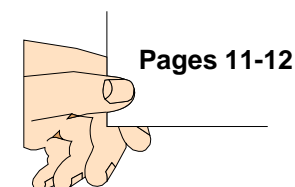
### Key Point

### Content

### Support/Notes

#### Range

1. What is customer service?
2. The benefits of customer care.
3. Why is customer service so important?
4. Who are your customers?
5. What you can personally do to promote good customer service?
6. Identifying customer needs and expectations.
7. Creating a safe working environment.



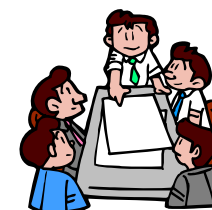
#### Outline

Outline session as appropriate including relevant interest factors and personal benefits.

#### Activity

Split into 3 groups and ask everyone to complete the exercise ready to present back.

1. What is Service?
2. As a customer, when have you experienced poor or horrible service?
3. As a customer, when have you experienced great service?



Ask delegates to think of example organisations when completing this activity and to write up ideas on a flip-chart ready to share with the other groups. When the exercise has been completed, ask each group to present their views back to the others. Make a note of any key points and listen to all the presentations before summarising. Allow 5-10 minutes.

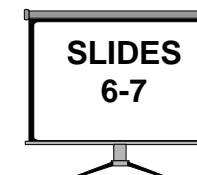


The summary will depend on how the different groups have approached the Exercise.

Use slide 6 as a summary and to link what has been said about customer service.

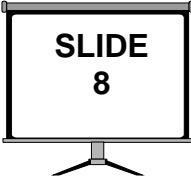
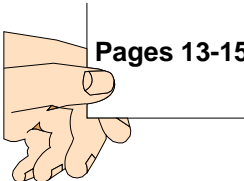
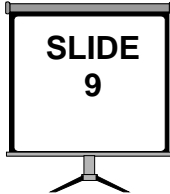
Use slide 7 to discuss how companies, who give excellent service, look after their customers.

Discuss responses.

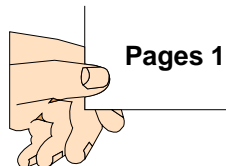

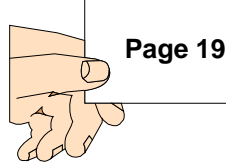


## Section 1 Introduction to Customer Service

---

Key Point	Content	Support/Notes
<b>Ask</b>	<b>Why is service so important?</b> Log and discuss responses.	
<b>Discuss</b>	Using slide 8 cover the following points: <ul style="list-style-type: none"> <li>• Intense competition.</li> <li>• Customers have a choice.</li> <li>• It is the only thing that can make us different from our competitors.</li> <li>• Satisfied and delighted customers will come back.</li> <li>• Dissatisfied customers will not come back.</li> </ul>	
<b>Ask</b>	<b>Why is customer service so important in your business?</b>	
<b>Discuss</b>	Discuss responses.	
<b>Ask</b>	<b>Who actually are your customers?</b>	
<b>Discuss</b>	Discuss the concept of internal customer service. Using slide 9 explain how we are all customers of each other.  Explain – A customer is any person on the receiving end of our products and services, if we are not serving the external customer, we are serving someone who is. We are not in competition with ourselves. Everyone in your organisation is responsible for service somewhere along the line. This may be the: <ul style="list-style-type: none"> <li>• Shop assistant who serves customers.</li> <li>• Hairdresser who cuts you hair.</li> <li>• Assistant at the bank who serves you and assists you in paying money in.</li> </ul>	

## Section 1 Understanding the Theories of Conflict

Key Point	Content	Support/Notes
<b>Stress</b>	Companies can only offer a truly professional service to external customers if they also offer a professional service to their internal customers. Everybody serves someone and in turn is served by someone else in the organisation.	 <p><b>Pages 16-18</b></p>
<b>Activity</b>	<p>Ask everyone to turn to page 16 and to identify some of their internal customers.</p> <p>Allow 5 minutes for delegates to complete on their own or in pairs and share responses.</p> <p>Log ideas on a flip-chart.</p> <p>Discuss responses – stress that anyone could be their internal customers.</p>	
<b>Stress</b>	<p>Stress that this means they need to view customers as an important part of their job and aim to:</p> <ul style="list-style-type: none"> <li>• Be responsive to the needs of customers.</li> <li>• Comply with hygiene, health and safety law and procedures to keep the customer safe.</li> <li>• Give their undivided attention.</li> <li>• Develop a customer friendly attitude.</li> <li>• Show understanding and empathy.</li> <li>• Deliver their promises.</li> <li>• Present a positive image at all times.</li> </ul>	
<b>Explain</b>	<p>What is a need compared to an expectation – see Delegate Workbook and slide.</p> <p><b>Discuss the special needs that people may require, dietary, illnesses, mobility etc.</b></p>	 <p><b>Page 19</b></p>

## Section 1 Introduction to Customer Service

### Key Point

### Content

#### Activity

Split up everyone into 3 groups. – Use page 20 of the delegate handbook for activity. Give a different question to each group to consider and jot their ideas down on a flip-chart.

**Group 1** – What sort of needs and expectations will your customers have?

**Group 2** – What will be your own expectations when dealing with customers?

**Group 3** – What will be your organisation’s expectations?

Allow 5 minutes and take responses from the groups.

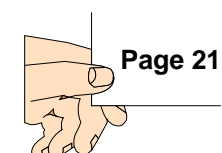
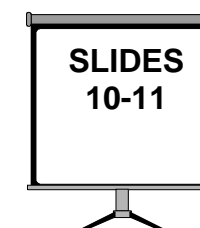
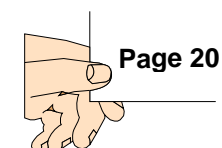
Cover the points on slides 10-11 about customer expectations and the demands put on the service provider.

- The core service to meet their needs for quality.
- Polite treatment at all times – even when they are being difficult.
- To see attention is being paid to their requests.
- To feel their needs are important.
- Do not want to hear “no” or “I don’t know”.
- To feel secure in the knowledge that you have all the answers and solutions.

Customers:

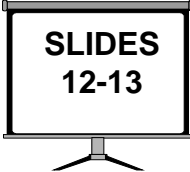
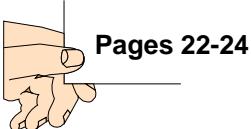
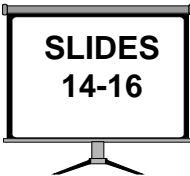
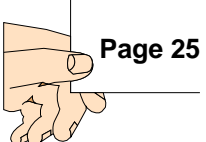
- Want mistakes admitted to and rectified.
- Expect promises that are made to be honored.
- Expect to be treated with respect.
- Expect to be treated as an individual by being given personalised service.
- Require your time to be given to them for explanations.
- Want to know when a problem arises.
- Expect you to know about your job and your company.
- Expect you to be able to answer questions.
- Expect you to find solutions to their problems.
- Expect you to provide a safe and hygienic environment.
- Expect you to know how to assist them in any emergency.

### Support/Notes



## Section 1 Introduction to Customer Service

---

Key Point	Content	Support/Notes
<b>Stress</b>	<p>When you can <b>meet</b> customers' <b>needs</b> and <b>exceed their expectations</b>, it will have a surprise element that will encourage customers to come back. There is no point in simply meeting their needs, we strive to exceed in customer excellence to delight our customers.</p> <p>Cover the points on slide 12 about 'Your Expectations'.</p> <p>Cover the points on slide 13 about the 'Organisation's Expectations'.</p>	
<b>Health and Safety</b>	<p>Introduce the concept of working in a safe environment as outlined at the end of Section 1. Delegate Workbook pages 22-24.</p> <p>Discuss the basis of why it exists and what it covers eg hazardous waste, hazardous equipment, heat, light, ventilation etc.</p> <p>Using slides 14-16, introduce concept of employers and employees responsibilities.</p>	 
<b>Summarise</b>	<p>Conclude with section summary on page 25 of the Delegate Workbook.</p>	



## Section 2 Effective Communications

Key Point

Content

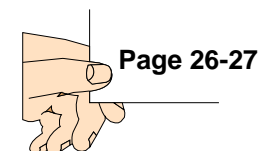
Support/Notes

**Section 2**

Aims

At the end of this section delegates should be able to:

- Demonstrate some understanding of the importance of developing effective communication.
- Describe the effects of ineffective or inappropriate communication.
- Start to apply a range of verbal and non-verbal communication and telephone techniques.



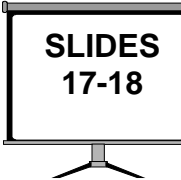

### Indicative Content

- 2.1 Consider the impact upon the customer and the organisation of effective and ineffective communications, eg confusion and misunderstanding, annoyed and unhappy customers, loss of business, loss of profit.
- 2.2 Explain the importance of listening to customers and how to demonstrate to customers that you're taking notice of what they say.
- 2.3 Provide an overview of the use of some non-verbal techniques such as use of eye movements, gestures including the use of body, face and hands, facial expressions, physical evidence, ie appearance.
- 2.4 Show an awareness of the use of tone of voice and expression when dealing with customers – how to use tone of voice to the best advantage – avoiding using raised voices, harsh tones and high pitched voice.
- 2.5 Provide an insight into how to use verbal and non-verbal communications whilst on the telephone.

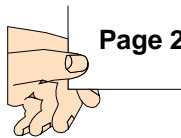
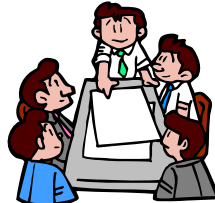

**Range**

1. Effective and ineffective communication.
2. Question techniques.
3. Listening skills.
4. Telephone techniques.

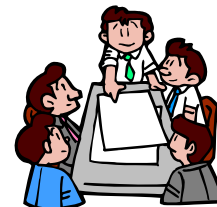
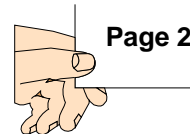
## Section 2 Effective Communications

Key Point	Content	Support/Notes
<b>Outline</b>	Outline session as appropriate including relevant interest factors and personal benefits.	
<b>Explain</b>	Explain what happens when we have effective communication and what happens when we do not have effective communication. (Use Section 2 of the Delegate Workbook for underpinning knowledge).	
<b>Ask</b>	<b>What examples of communicating with customers do you have that worked well or not so well?</b>	
<b>Discuss</b>	Discuss responses.	
<b>Ask</b>	<b>How would you define communication?</b>	
<b>Discuss</b>	Discuss responses.	
<b>Definition</b>	Explain what effective communication is using the flip-chart:  <i>"Communication is a two way process and is only effective when the message is understood in the same way by both the sender and the receiver."</i>	
<b>Stress</b>	Stress the importance of two-way communication and the need for understanding.  Stress that there are many opportunities for communication to break down and it is essential that we consider how to communicate effectively, especially the words we use and how they could be negative.	


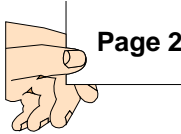


## Section 2 Effective Communications

Key Point	Content	Support/Notes
<b>Activity</b>	<p>Split into smaller groups and turn to associated exercise in the Delegate Workbook page 27.</p> <p><b>“What can you do to communicate effectively with customers?”</b></p> <p>Allow 5 – 10 minutes, ask delegates to present back on a flip-chart.</p> <p>Discuss responses and look at some of the following:</p> <ul style="list-style-type: none"> <li>▪ Pay attention.</li> <li>▪ Give eye contact.</li> <li>▪ Ask effective questions.</li> <li>▪ Listen carefully.</li> <li>▪ Read the non-verbal messages.</li> <li>▪ Take notes.</li> <li>▪ Repeat back to customers any actions you have agreed.</li> <li>▪ Clarify understanding.</li> <li>▪ Be realistic.</li> <li>▪ Under-promise and over-deliver.</li> <li>▪ Exceed expectations.</li> </ul>	<p><b>Page 27</b></p>   



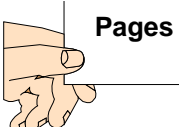
## Section 2 Effective Communications

Key Point	Content	Support/Notes
<b>Listening</b>	Link to listening by explaining that there is no point asking effective questions if you are not prepared to listen to the answers.	
<b>Ask</b>	<b>Who thinks they are a good listener?</b>	
<b>Exercise</b>	<p>Carry out an exercise to see how good the delegates are at listening. Send everyone except one person out of the room. Give this person a message and ask them to pass it on to the next person and then the next person etc.</p> <p>Sample Message: Mr Smithy the Managing Director of Electronics International is booked into the hotel for Friday 2<sup>nd</sup> November. Could the concierge arrange for him to be picked up at the City Centre Railway station at 15.00 hours that day please? He needs to be at the hotel for a meeting by 1600 hours.</p> <p>Run the exercise and discuss the outcome – it is not always that easy to listen!</p>	
<b>Ask</b>	<p><b>Why do people find it difficult to listen?</b></p> <p><b>What can you do to show that you are listening to customers?</b></p> <p><i>(This can be a discussion as a main group.)</i></p>	
<b>Discuss</b>	<p>Allow 5 minutes and discuss responses, eg</p> <ul style="list-style-type: none"> <li>• Do not understand.</li> <li>• Think we hear things that are not said.</li> <li>• Make things up.</li> <li>• Tiredness.</li> </ul>	 <p><b>Page 28</b></p>

## Section 2 Effective Communications

Key Point	Content	Support/Notes
<b>Recap</b>	<p>Show you are listening. The listening check list:</p> <ul style="list-style-type: none"> <li>• Look at people.</li> <li>• Turn-off negative thoughts.</li> <li>• Lean towards people.</li> <li>• Start with the first word.</li> <li>• Think of speed.</li> <li>• Do not interrupt.</li> <li>• Nod.</li> <li>• Ask questions.</li> <li>• Stick to the subject.</li> <li>• Use their name and use 'you.'</li> </ul> <p>This is a recap from points made earlier. Use slide 19 to summarise how you can listen more effectively.</p>	
<b>Questions</b>	<p>Discuss aspects of using effective questions to open the discussion with the customer. Page 29 of the delegate handbook</p> <p>Write the different types of questions they may ask on the flip-chart:</p> <ul style="list-style-type: none"> <li>• Open</li> <li>• Closed.</li> </ul> <p>Explain using examples of the different questions – write up as you go along and use slide 20 as a summary.</p>	
<b>Ask</b>	<p><b>Open Questions</b> Ask for examples from the group as to how they could open a conversation with a customer, eg “How may I help you?” “What type of....are you looking for?”</p> <p>Make sure they are all open questions – Who, What, Why, Where, How, When.</p> <p><b>Closed Questions</b> Explain when closed questions can be useful, eg to obtain a simple yes or no answer and to check you understand their requirements etc.</p>	 

## Section 2 Effective Communications

Key Point	Content	Support/Notes
<b>Practical Work Questions</b>	<p>After discussing the different types of questions split everyone into 2's or 3's to practice using open questions.</p> <p>Put some typical customer situations on the flip-chart and ask delegates to come up with example questions they could ask:</p> <ul style="list-style-type: none"> <li>• Trying to find out what assistance a customer requires.</li> <li>• Wanting to see if there is any further information the customer requires.</li> <li>• Checking to see that the customer is happy with an outcome.</li> </ul> <p>Encourage delegates to “role-play” this part of the practical. Oversee this activity and when complete, ask for some good examples they have come up with to share with the rest of the group.</p> <p>Body Language is shown in many ways. Run through briefly how body language is shown (go into more detail later):</p> <ul style="list-style-type: none"> <li>• Appearance/physical evidence.</li> <li>• Eye contact.</li> <li>• Facial expressions.</li> <li>• Posture and gestures.</li> <li>• Personal space.</li> </ul>	     <p><b>Pages 30-31</b></p>
	<p>Use pages 30-31 of the Delegate Workbook to assist you with this. Use role play and act out the various actions and engage delegates by identifying the various actions – particularly those listed on page 31.</p>	

## Section 2 Effective Communications

Key Point	Content	Support/Notes
<b>Appearance</b>	Appearance/Physical Evidence – messages from appearance – do not make assumptions based on the clothes your customers are wearing – ensure you meet the required standards.	
<b>Eye Contact</b>	Eye contact – need to give good eye contact to customers – it shows you are confident in what you are doing.  Ask about their own personal experiences of eye contact – staring – confrontation – complete avoidance – nervous – etc. Stress culture and eye contact.	
<b>Facial Expression</b>	Expressions – facial expressions and emotions – make sure your facial expression sets a positive tone before beginning to speak.	
<b>Posture</b>	Posture and Gestures – When trying to project a good first impression, our posture and gestures are likely to give our true feelings away.  Provide examples of posture and gestures used every day.	
<b>Personal Space</b>	Personal Space – comfort zone – how comfortable people feel when standing next to each other – being equal with customers.	



## Section 2 Effective Communications

### Key Point

### Content

### Support/Notes

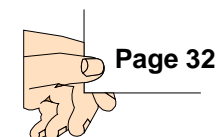
#### Ask

If the total of the three parts is 100%; how do each of them impact on face to face communication? (in percentage terms)

Ask for ideas before writing on a flip-chart showing:

- Verbal (words) – 7%
- Vocal (tone of voice) – 38%
- Body Language (non verbal communication) – 55%.

Demonstrate – If people find these figures hard to accept, say something cheerful whilst looking very glum and unhappy and ask which aspect of your communication they believe most.



#### Differences

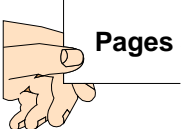
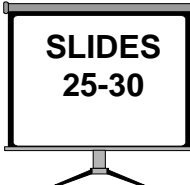
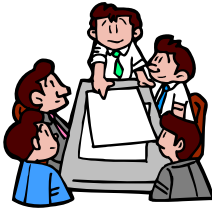
Discuss differences on the phone from face to face:

- It's not what you say – it is the way you say it.
- Need to be aware of the signs you are showing.

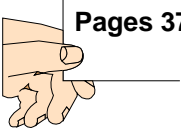




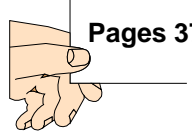
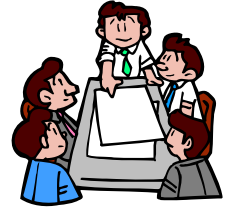

## Section 2 Effective Communications

Key Point	Content	Support/Notes
<b>Ask</b>	<b>Why do we need Customer Service and Telephone Standards?</b>	
<b>Discuss</b>	<p>Discuss responses and cover some of these points. Link these points to the need for Telephone Standards.</p> <ul style="list-style-type: none"> <li>• Project a professional image.</li> <li>• Be competitive.</li> <li>• Be consistent.</li> <li>• Customer expectation.</li> </ul> <p>Use pages 33-36 of the Delegate Workbook and slides 25-30 to explain the importance of using the telephone effectively in respect of customer services.</p>	<p>Pages 33-36</p>  
<b>Telephones</b>	<p>Using the slides and the Delegate Workbook, explain and discuss some of the key points about telephone standards relating to:</p> <ul style="list-style-type: none"> <li>• Answering the phone.</li> <li>• Transferring the call.</li> <li>• Taking messages.</li> </ul> <p>Stress particularly the importance of responding to all types of messages quickly.</p>	
<b>Role play</b>	<p>Ask everyone to break into groups and sit back to back to role-play answering the telephone. You can ask delegates to make up their own examples based on their experiences in the places they work.</p>	
<b>Ask</b>	<b>What would you do if you were on the phone and a customer appeared in front of you?</b>	
<b>Explain</b>	<p>Explain the importance of acknowledging customers in these situations.</p> <p>This could be done in 3's with one person being the caller, one being the receiver and one being the observer and giving feedback against the standards just discussed. Alternatively, if this is a small group, they could complete this exercise in front of everyone and you as the Tutor can provide the feedback.</p>	
<b>Summary</b>	<p>Consolidate the learning from this module and link to what we will do after the break.</p>	


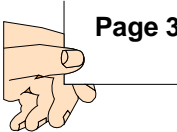
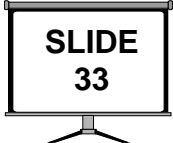

## Section 3 Presenting a Positive Personal Image

Key Point	Content	Support/Notes
<b>Section 3</b>	<p><b>Aims</b></p> <p>At the end of this section delegates should be able to:</p> <ul style="list-style-type: none"> <li>• Explain the importance of 'first impressions'.</li> <li>• Explain the importance of presenting a positive attitude and professional image.</li> <li>• Identify some of the appropriate verbal and non-verbal communication methods to be used in different customer situations.</li> <li>• Demonstrate an understanding of the need for personal space.</li> </ul> <p><b>Indicative Content</b></p> <p>3.1 Explain the importance of portraying a 'positive and professional' image in the context of customer service - the impact of the way we speak, dress, and deal with people.</p> <p>3.2 Explain why it is necessary to deal with customers promptly and politely and how in doing so it aids the perception of good customer service.</p> <p>3.3 Demonstrate an awareness of the importance of using verbal and non-verbal communications in developing a positive and professional image to instil confidence in the customer.</p> <p>3.4 Explain the importance of allowing customers personal space whilst serving them – the negative effect of overpowering the customer.</p>	<p><b>Pages 37-38</b></p> 
<b>Range</b>	<ul style="list-style-type: none"> <li>• First impressions.</li> <li>• Presenting a positive attitude.</li> <li>• Presenting a professional image.</li> <li>• Identifying and using customer friendly body language.</li> <li>• Understanding the importance of personal space.</li> </ul>	

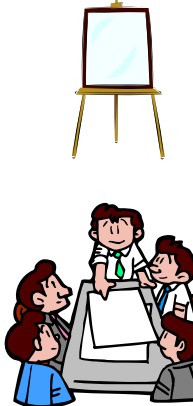
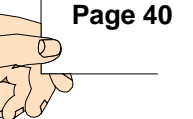
## Section 3 Presenting a Positive Personal Image

Key Point	Content	Support/Notes
<b>Outline</b>	Outline session as appropriate including relevant interest factors and personal benefits, highlighting work related and life examples.	
<b>Aim First Impressions</b>	<i>Everyone needs to have a positive attitude towards customers in order to offer excellent standards of service – if you think negatively about customers, your feelings will show and you may get negative results. If you think positively you will succeed, eg sports people think only about winning.</i>	 <b>Pages 37-38</b>
<b>Ask</b>	<p>How long does it take to make a first impression?</p> <p><i>3 seconds on average.</i></p>	
<b>Activity</b>	<p>Break into pairs. Ask everyone to address the 2 questions on page 38 of the Delegate Workbook.</p> <ol style="list-style-type: none"> <li><b>Why is it important to create a good first impression?</b></li> <li><b>How can you create a good first impression?</b></li> </ol> <p>Half the group could work on the first question and the other half the second question – 5 minutes in total.</p> <ul style="list-style-type: none"> <li>Negative first impressions take a long time to overcome</li> <li>Sets the tone for the communication with the customer</li> <li>Sets the level of service for the customer</li> <li>Positive image.</li> </ul> <ul style="list-style-type: none"> <li>Acknowledge</li> <li>Smile</li> <li>Eye contact</li> <li>Stop what you are doing and pay attention</li> <li>Through your attitude</li> <li>Through the pride you take in your appearance and hygiene, health and safety.</li> </ul>	  <p><b>Why</b></p>  <p><b>How</b></p> 

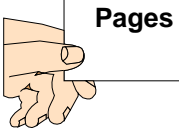
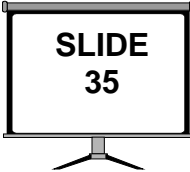
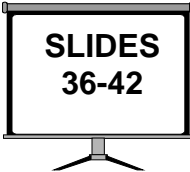
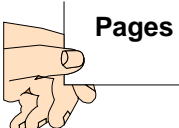
## Section 3 Presenting a Positive Personal Image

Key Point	Content	Support/Notes
<b>Ask</b>	<p>Show slide 32 <b>Who are you?</b></p> <ul style="list-style-type: none"> <li>➤ <b>‘Someone who makes things happen’</b></li> <li>➤ <b>‘Someone who watches things happen’</b> or</li> <li>➤ <b>‘Someone who wonders what happened’?</b></li> </ul> <p>Ask delegates which one they feel they are?</p>	 
<b>Negative Thinking</b>	<p>Slide 33 and Page 39 of the Delegate Workbook.</p> <p>Relate this to negative thinking and the results you get when you think negatively toward customers. Negative thinking encourages negative feelings and actions and often ends in negative results. Negative thinkers focus on what cannot be done instead of putting energy into what can be done.</p> <p>Example: restaurant is closed and you turn a customer away instead of offering a compromise or alternative to the full menu.</p>	
<b>Positive Thinking</b>	<p>Using slide 34, explain that we should be developing positive thinking, which is more likely to result in positive feelings and actions and positive results – focus on what you can do to make things work.</p>	
<b>Explain</b>	<p>Explain your attitude towards customer service and how it is determined by how you feel about:</p> <ul style="list-style-type: none"> <li>• Your job and what you do.</li> <li>• Customers and colleagues.</li> </ul> <p>Both of these areas have tremendous impact on our attitude and whether we then portray a negative or positive attitude to customers.</p>	

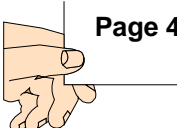
## Section 3 Presenting a Positive Personal Image

Key Point	Content	Support/Notes
<b>Exercise</b>	<p>Delegate Workbook page 40. Split into smaller groups of 3 or 4 people (dependent on numbers).</p> <p>Brief the groups on a flip-chart. Ask half of the group/s:  <b>“What are the negative views and thoughts that we may have about a) our jobs and b) our customers?”</b></p> <p>For the remaining group/s:  <b>“What are the positive views and thoughts that we may have about a) our jobs and b) our customers?”</b></p> <p>Explain that you would like the groups to feedback and allow 5 minutes for them to brainstorm.</p> <p><b>Negative Views</b> eg repetitive work, demanding customers, aggravation, customers stop you getting your work done etc.</p> <p><b>Positive</b> eg interesting varied work, meet lots of people, friendly customers, always something different, great when you help people.</p> <p>Keep the different groups apart then in the main group take feedback from:</p> <ol style="list-style-type: none"> <li>1. The group/s looking at negative views on your job and customers.</li> <li>2. The group/s looking at positive views on your job and customers.</li> </ol> <p>Compare the differences and what it might be like for customers. Ask delegates where they would rather be a customer – definitely where staff view their job and customers positively.</p> <p>Delegate Workbook page 40. Ask delegates to write down a negative thought they have had about customers in their Workbook. When they have completed this, ask delegates to turn it into a positive thought. Discuss responses.</p> <p>Ask delegates also to think of qualities they possess that will enable them to deal with customers positively and to jot them down in their Workbooks.</p>	
<b>Discuss</b>	Discuss responses.	
<b>Highlight</b>	<p><b>The focus is on you, you make the difference!</b></p> <p>Ask delegates to fill the ‘spotlight on you’ box.</p>	<p><b>Page 40</b></p>

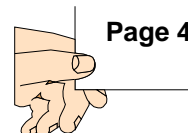

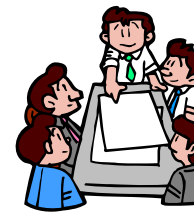
## Section 3 Presenting a Positive Personal Image

Key Point	Content	Support/Notes
<b>Discuss</b>	<p>Discuss the concepts of:</p> <ul style="list-style-type: none"> <li>• Behaviour breeds behaviour.</li> <li>• You can choose your behaviour.</li> <li>• Do not be a prisoner of your behaviour.</li> </ul>	<p>Pages 41-44</p> 
<b>Stress</b>	<p>Stress the need to:</p> <ul style="list-style-type: none"> <li>• Be professional.</li> <li>• Show understanding.</li> <li>• Be patient.</li> </ul> <p>Link back to first impressions and a professional image.</p> <p>Stress how quickly a first impression is created and how it is such a lasting impression for our customers. We all need to make sure that we project a professional image.</p>	
<b>Explain</b>	<p>Using slide 36 and page 42 of the Delegate Workbook, cover the key points of projecting a professional image. One of the key aspects of communication demonstrated to customers is body language. Non-verbal communication or body language is one part of total communication along with words and tone of voice (<i>explain further if necessary</i>).</p>	
<b>Stress</b>	<p>Stress that the important thing delegates should be aware of is non-verbal telephone activity.</p> <p>Encourage delegates to refer back to their work in Section 2. Ask them to take those areas and show how they can use them in Activity 5- on page 44 of the Delegate Workbook. Using slide 38, remind delegates of the balance of words, verbal and body language that constitute and affect personal image.</p> <p>Using Delegate Workbook pages 45-46, gain an understanding of positive and negative behaviour as outlined on page 46 – then work through appearance and negative messages.</p> <p>Using Delegate Workbook page 47, ensure that delegates also understand the concept of ‘personal space’ and how that can impact upon communications.</p>	<p>Pages 45-48</p> 
<b>Summarise</b>	<p>Ultimately conclude with the summary on page 48 of the Delegate Workbook.</p>	

## Section 4 Handling Customer Complaints




Key Point	Content	Support/Notes
<b>Section 4</b>	<p><b>Aims</b></p> <p>At the end of this section delegates should be able to:</p> <ul style="list-style-type: none"> <li>• Explain why customers complain.</li> <li>• Appreciate the benefits of receiving customer complaints in improving customer service.</li> <li>• Demonstrate an understanding of the techniques involved in handling difficult customer situations.</li> <li>• Explain ways of handling complaints positively.</li> </ul> <p><b>Indicative Content</b></p> <p>4.1 Identify a broad range of reasons why customers complain eg faulty goods, poor levels of service, time delays, rudeness, service not meeting expectations.</p> <p>4.2 Demonstrate the importance of listening to the complaint and not making early judgements.</p> <p>4.3 Appreciate the benefits of receiving customer complaints in terms of supporting efforts for continuous improvement within the business.</p> <p>4.4 Explain how to avoid the use of defensive behaviour in stressful situations.</p> <p>4.5 Demonstrate an understanding how to gain support and assistance from line-managers when handling complaints.</p> <p>4.6 An overview of various techniques of handling complaints positively, including consultation/listening, discussing proposed actions, keeping customers informed of actions/timings and ensuring that complaints are resolved satisfactorily.</p> <p>4.7 The role of customer services departments in supporting the customer service process.</p>	<p><b>Page 49</b></p> 

## Section 4 Handling Customer Complaints

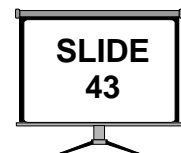
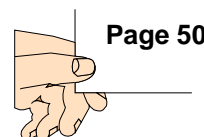
Key Point	Content	Support/Notes
<b>Range</b>	<p>Use pages 49 of the delegate handbook.</p> <ul style="list-style-type: none"> <li>• Why do people complain?</li> <li>• Resolving customer situations – calming customers.</li> <li>• Complaint Handling Process.</li> </ul> <p>Highlight the need to check the employer’s guidelines for complaint handling, their authority levels and response times. Explain that due to legal implications you would not apologise in the same way if a customer has suspected food poisoning.</p>	<p>Page 49</p> 
<b>Outline</b>	<p>Outline session as appropriate including relevant interest factors and personal benefits.</p>	
<b>Difficult situations</b>	<p>Explain – during this last session we will look at how you can deal with some of the difficult situations you may be faced with when dealing with customers.</p> <p>However much you try to be helpful there may be times when you have to deal with tricky or difficult situations.</p>	
<b>Ask</b>	<p><b>How does it feel when you have to deal with difficult situations?</b></p> <p>Discuss responses, eg uncomfortable – stressful – out of control etc.</p>	
<b>Ask</b>	<p><b>What type of difficult situations do you have to handle?</b></p> <p>Log ideas on the flip-chart <b>or</b> give out cards and ask delegates to write down some difficult situations they may have to face. When this has been completed, distribute the difficult situations to small groups and ask them to decide how they could handle it.</p> <p>Take feedback ensuring you pick up the key words for handling difficult situations.</p> <p>Link this to how people behave when they are being difficult.</p>	



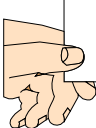

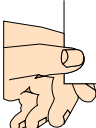

## Section 4 Handling Customer Complaints

Key Point	Content	Support/Notes
	Draw a line down the flip-chart.	
<b>Ask</b>	<b>How do people behave when they are annoyed/let down/difficult?</b>  Log thoughts on flip-chart under “Difficult Person” on left side of sheet, <i>eg irrational, rude, blunt, difficult to communicate with.</i>	
<b>Ask</b>	<b>How should you therefore behave?</b>  Log thoughts on flip under “You” on right side of sheet. <i>eg keep quiet, don’t interrupt, listen carefully, empathy, reassure, summarise, do not get personal, offer assistance, and ask the right questions.</i>  Explain that if you allow customers time to let off steam, they will start to calm down. At this stage do not cover in great detail, explain to delegates that we will be coming back to this topic later on in more depth.  Link this information to specifically dealing with complaints.	
<b>Activity</b>	Split the groups up into smaller groups, and using Section 4 of the Delegate Workbook ask them to come up with some more specific behaviours related to complaints mentioned earlier, <i>eg will not take no for an answer, expect an immediate solutions, will carry on complaining if not satisfied with your response, may be hard to please etc.</i>  Allow 5 minutes and ask for feedback on a flip-chart.	
<b>Discuss</b>	Discuss responses.	

## Section 4 Handling Customer Complaints

Key Point	Content	Support/Notes
<b>Discuss</b>	<p><b>Activity 6 – Page 50 of the Delegate Workbook.</b> Cover some of the following points in the discussion.</p> <p><b>What is a complaint?</b></p> <ul style="list-style-type: none"> <li>• Feedback from customers.</li> <li>• An opportunity.</li> <li>• A chance to put things right.</li> </ul>	
<b>Why people complain</b>	<p><b>‘Why do people complain?’ Why do <u>96%</u> of customers never complain?</b></p> <ul style="list-style-type: none"> <li>• Angry.</li> <li>• Upset.</li> <li>• Justified.</li> <li>• Poor service.</li> <li>• Annoyed.</li> <li>• Let down.</li> </ul>	
<b>Behaviour</b>	<p><b>What behaviours do people display when they are complaining?</b></p> <ul style="list-style-type: none"> <li>• Angry.</li> <li>• Loud.</li> <li>• Rude.</li> <li>• Will not listen.</li> <li>• Interrupt.</li> <li>• Demanding.</li> <li>• Condescending.</li> <li>• Wound up.</li> </ul> <p>Explain that we need to focus on calming customers down when they are like this.</p>	

## Section 4 Handling Customer Complaints

Key Point	Content	Support/Notes
<b>Causes of customer complaints</b>	<p>Delegate Workbook page 51.</p> <p>Discuss the facts that cause conflict situations and create scope for customers to complain. Consider how to deal with complaints and the benefits of complaints.</p>	 <p><b>Pages 51-54</b></p>
<b>Calming customers who are angry or upset</b>	<p>Explain and demonstrate how calming responses can be used to calm customers down who are complaining: Use page 55 of the Delegate Workbook.</p> <ul style="list-style-type: none"> <li>• Listen.</li> <li>• Show empathy.</li> <li>• Agree on common ground.</li> </ul>	 <p><b>SLIDE 44</b></p>
<b>LAST</b>	<p>Explain and demonstrate how <b>LAST</b> can be used to handle complaints.</p> <ul style="list-style-type: none"> <li>• <b>Listen</b> – remember what we said earlier about listening.</li> <li>• <b>Apologise</b> – be positive about the apology.</li> <li>• <b>Solve</b> – use open questions to find out the facts, and then provide a solution to the problem.</li> <li>• <b>Thank</b> – be polite, thank the customer sincerely for bringing this to your attention.</li> </ul> <p>Stress the need to pass any complaints on to their manager.</p> <p>Other factors: Avoid defensive behaviour. Use practical tips for conflict handling on page 58 of the Delegate Workbook.</p> <p>Where to go in times of trouble – emphasise the need to involve line managers and other staff in difficult situations, particularly if they do not have the authority to resolve the situation, or where the situation becomes too difficult to manage.</p>	 <p><b>Pages 55-59</b></p>  <p><b>SLIDE 45</b></p>

## Section 4 Handling Customer Complaints

Key Point

Content

Support/Notes

**Role Plays**

Link to role-play to practice the skills.

Create some complaint handling cards ready for role-play (see suggestions on next page).

Arrange delegates into groups of 3. Give out the role-plays and ask delegates to handle the situation – one to be the customer, one to be the member of staff, one to be the observer.

After each role play the remainder of the group are to give feedback to the person handling the complaint using the framework of LAST.

Once delegates have started on the role-plays, move about the room coaching and ensuring everyone is covering the points. If you have a smaller group you may want to do the role-plays as a main group.

When all role-plays are completed, take feedback in the main group of the key learning points of the exercise.

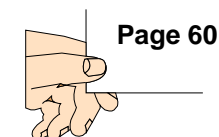
List learning points on a flip-chart.

Link to the review of the day.



## Section 4 Handling Customer Complaints

Key Point	Content	Support/Notes
<b>Example Role Plays</b>	<p>Example role-plays (you may need to adapt to meet the needs of the group.)</p> <ul style="list-style-type: none"> <li>• Create a card for the complainer describing the situation.</li> <li>• Create a card for the member of staff receiving the complaint stating what department they are in.</li> <li>• Observer to feedback on LAST principles.</li> </ul> <ol style="list-style-type: none"> <li>1. A customer arrives at a hairdresser salon and has an appointment for 10.30am. However, at 11.15 the hairdresser has not started the customer's hair. The customer is very annoyed as she has an important interview to attend after lunch, for which she might now be late.</li> <li>2. A customer arrives to catch a train, which has been pre-booked for two weeks, only to find that the train has been cancelled and no alternative transport is being provided.</li> <li>3. <b>Telephone</b> – Under the instructions of a travel assistant, a customer rings the travel agent to confirm their holiday arrangements by credit card, only to find that the holiday they were ringing to book, has been taken by someone else.</li> <li>4. <b>Telephone</b> – A customer rings to try and book a dentist appointment and has been trying to do so for sever weeks but nobody ever rings her back. She is now very annoyed.</li> </ol>	
<b>Summary</b>	Consolidate the learning from this module and link to what we will do after the break.	



## Evaluation, Review and Test Induction

Key Point

Content

Support/Notes

**Course Review**

Verbally check how objectives have been met.

Distribute Evaluation forms.

**Test Induction**

Use slides 46-47 to introduce the test.

Use the sample questions on our website to prepare delegates for the types of questions that they may come across.

Prepare for one-hour assessment. Examples of completed Test Papers to be collected from our website.

**Close Review**

Explain follow up procedure/post course learning.

Collect evaluation sheets.

Thanks.

**Close** workshop.

