

Make it Stick

*Activity Pack*

Customer Service

**Helping lessons learned in training blend in to become *how we work*.**

**To the Learner Leader…**

This suite of activities has been designed to reinforce the key learning from the **Customer Service** course. They have been designed to be led by Team Leaders or designated Trainers and do not require training experience, though for best results we recommend that whoever is leading the activities understands the principles of adult learning and has some experience in leading learning activities.

The suite of activities will provide you with up to six months of learning reinforcement. We recommend that an activity is run each month following the Customer Service course.

When running each activity:

* Ask the group to reflect back on the original course they attended:
* What takeaways they had
* What they have tried to implement
* When revisiting some of these activities for a second time ask them what additional ideas or thoughts they have in applying the concepts and tools in the activities to their job

Each activity will take 10-15 minutes to run depending on the size of the group.

There is one Activity to a page. Each Activity has a brief introduction followed by instructions for the Learner Leader.

We suggest the following to optimise your learning experience:

* Have the group meet away from their normal workspace
* Make sure mobile devices are switched off so that everyone fully engages
* Make the environment ‘safe’ and encourage everyone to contribute
* Run these activities with everyone standing – try running these outdoors in the fresh air
* Have other team members take the lead and run an activity – this will build confidence and leadership skills
* Don’t be afraid to improvise – the learning needs to be about you and your group so make it meaningful
* When debriefing an activity get the group to reflect on what the activity means for them and what they will do differently or continue to do that underscores the learning points from the activity

**Activities in this pack**

1. Principles of great service
2. This is what I ‘can’ do
3. Personal style and customer service
4. The power of leaning in – the first response
5. The steps of acknowledgment
6. Holding others to account

**Activity 1: Principles of great service**

**Introduction**

A good habit to get into is to continually evaluate the level of service you are providing in an effort to find where service delivery could be improved. Often customers will provide you with such feedback. Another method is self-reflection or group reflection. You can reflect on whether you and your team are upholding the seven principles of customer service put forward by Pascal van Opzeeland.

**Instructions**

Get your group to critically evaluate if they and their team uphold the principles of great service in the table below by placing themselves in the shoes of their customers. Use the questions to generate discussion. Ask the group to offer what they should do differently.

|  |  |  |
| --- | --- | --- |
| **Principle** | **Questions to evaluate** | **What we will do differently** |
| Speed | Do our customers think we provide a speedy service?Do we get back to our customers as soon as possible?Are our customers surprised with how fast we deal with their queries? |  |
| Accuracy | Do we make mistakes?Do our customers pick up on our inaccuracies?Do our customers tolerate our errors/inaccuracies from time to time? |  |
| Transparency | Do our customers think we keep them well informed?Do we always provide reasons for delays in fulfilling a service to our customers? |  |
| Accessibility | Do our customers complain about contacting us?Do we allow calls and contacts to ‘slip through’?Is it sometimes difficult for customers to get an answer from us? |  |
| Empowerment | Do our customers feel in control?Do they feel they have all necessary information to make informed decisions? |  |
| Friendliness | Do our customers think we are polite and friendly to deal with?Are there instances when we are not polite or friendly to our customers? |  |
| Efficiency | Do our customers believe we deliver services both efficiently and effectively? |  |

**Activity 2: This is what I ‘can’ do**

**Introduction**

One of the things that makes customer service staff nervous is when they are put in a position in which they have to say ‘no’ to customers. Another way of tackling this is to get into the habit of saying what you ‘can’ do rather than what you ‘can’t’ do

**Instructions**

Have the group stand in a circle. One person asks another member of the group something that they cannot say ‘yes’ to. That person must then come up with an appropriate alternative response.

For example:

Customer: I want filet mignon for lunch

Service person: While we don’t have filet mignon on the menu we do have a delicious beef salad

The more outlandish the request, the more creative the response.

The requests being asked should reflect the product and service offering or genre of your organisation.

Reflect with the group on when they would typically say ‘no’ to a customer and come up with alternatives they can offer in future.

This exercise should equip your team with the skills to offer alternatives to any request regardless of how ridiculous the request may be. Customers don’t like to hear what they can’t have and would prefer to hear about what they can have.

**Activity 3: Personal style and customer service**

**Introduction**

How you communicate (either verbally or in writing) and how you deliver customer service is influenced by your personal style. In this activity you will consider the role personal style plays in influencing how you deliver customer service and how customers may interact with you

|  |  |  |
| --- | --- | --- |
| **Type** | **Do** | **Avoid** |
| Counselor | Build genuine rapportAffirm what you hearRecognize personal interests | Rushing the conversationUsing an impersonal toneOverlooking their concerns |
| Coach | Focus on the big pictureEmphasize impact on peopleEncourage brainstorming | Sharing unnecessary detailsLimiting their feedbackUsing an impersonal tone |
| Advisor | Focus on the detailsEmphasize logic and rationaleDraw out specific concerns | Using emotional argumentsOffering vague expectationsPushing for a conclusion |
| Driver | Focus on the bottom lineEmphasize resultsBe clear and specific | Forcing personal small-talkControlling the conversationChallenging their position |

**Instructions**

Ask each of the group in turn to identify their own type and then reflect on what this means for them when interacting with each of the other types

* Counselor
* Coach
* Advisor
* Driver

…in the following situations:

* The customer has phoned to complain
* The customer is in a hurry and needs your advice
* The customer is unsure on whether a particular product will suit them
* The customer is asking about the warranty period
* The customer has asked about your returns policy

**Activity 4: The power of leaning in – the first response**

**Introduction**

Customer service is tested most keenly when things go wrong, when customers are critical of the product or service they have bought or when a process frustrates or infuriates them – when there is a customer crisis.

**Instructions**

Go through the following attributes to a crisis response before role playing some scenarios on applying them. Responding to a crisis involves:

* Handing complaints back to the customer – this is about acknowledgement

**Customer** - Your pathetic product messed up my engine

**Service person** – Wow, so this product actually caused engine trouble. That’s really scary.

* Use the customers words and tone – mirror their language

**Customer** – Your stupid camera didn’t work at my daughter engagement party.

**Service person** – Really, at your daughter’s engagement. That’s terrible. I’d be furious about that.

* Steal all their good lines – predict how people might react to a situation and articulate that first

**Customer situation** – the store has just run out of the ‘must have’ toy for this Christmas

**Service person** – You probably came to our store tonight just to get this toy

Now practice the following in pairs. Customer lines (or get your group to come up with their own):

* This warranty service is a joke. I was waiting on the phone 40 minutes only to be cut off!
* Since I bought this car six months ago I have been back here 10 times to get things fixed. I want my money back.
* The last time I ate here I got food poisoning.
* Your online service is hopeless. The links don’t work and I get timed out trying to do really simple things.

**Activity 5: Steps of acknowledgement**

**Introduction**

There are four levels of response we can provide to defuse situations:

1. Paraphrasing – mirroring the customers statements with empathy
* Listen well before responding
* Reflect the world as the customer sees it, not as you see it
* When reflecting put their words into your own words – do not reflect back verbatim
1. Observation – reflecting what the customer is thinking and feeling
2. Validation – letting customers know their feelings are valid
	* “You have every reason to be upset”
	* “I can understand why you would be upset”
3. Identification –sharing what you feel in common with the customer
	* The phrases involve you – “That would bother me too”
	* If you can’t identify with a person then don’t attempt to

**Instructions**

Break the group into pairs and get them to practice the following playing the part of the customer or the customer service representative.

**Situation 1**

The customer returns to the place where he had parked his car only to find that it has been towed. The customer parked in a no-parking zone. The sign stating the parking conditions was partially obscured behind a tree and the customer didn’t see it. As a result, he will have to pay a $400 fee to retrieve his vehicle plus the added expense and inconvenience of getting to the vehicle impounding centre. The customer rings up the local authority that deals with vehicle retrieval.

**Situation 2**

A customer bought an expensive pair of shoes three years ago that she has only worn twice. The second time the shoes were worn the heel on the left shoe snapped resulting in a sprained ankle and a broken shoe. The customer has come into the store with the shoes and a credit card statement showing when they were purchased. The customer is demanding a replacement or a full refund.

**Situation 3**

A customer has rung a plumbing company. A plumber had been out to her house the day before to repair a leaking pipe in the bathroom. The pipe continued to leak but more profusely than before and water has dripped onto and into a filing cabinet in the room below the bathroom and destroyed several paper files belonging to the customer’s business.

**Activity 6: Holding others to account**

**Introduction**

The culture of an organisation refers to what behaviours are accepted and normalised by the organisation including the behaviours that extend to customers. Everyone has a responsibility to continually shape the culture they want to see. This takes courage as it involves not only role modelling the behaviour you want to see but calling out poor behaviour in others.

**Instructions**

Discuss with the group how they would approach the following situations:

* What would they do?
* What would they say?
* How would they go about it?

**Scenario 1**

Your boss has been rude to several customers over the last few weeks. The customers have taken their business elsewhere. Your boss has not reported the complaints that have come in.

**Scenario 2**

A colleague has been deliberately excluding you from sharing formation related to your job. He states that it is in retaliation for you contacting a customer that he refused to help.

**Scenario 3**

Your boss overrides you in relation to a refund claim where you refused the claim as it was outside the terms of your company’s refund policy. You find out that the claimant is related to your boss.

**Scenario 4**

A colleague continues to be rude to customers arguing with them about returns and refusing many. When you have approached him he states that it is none of your business and that he is just following store policy.