

PREVIEW GUIDE



The Customer Service Toolkit

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Toolkit Contents

CRM Learning's **Customer Service Toolkit** includes this Leader's Guide, a DVD, and two CD-ROMs.

This **Leader's Guide** provides an introduction to the Toolkit, suggestions for its use, and tables to help identify which segments are most appropriate for your planned training sessions. This Leader's Guide also includes Training Designs for each of the 72 segments in the Toolkit.

Training designs include:

- An overview of each video clip,
- Topic areas it applies to,
- A brief synopsis of the video and its application to the customer service process,
- Discussion questions with suggested answers, and
- Back at Your Desk activities.

The **DVD** menu system allows you to move quickly from one video segment to another or from one category to another, depending on the structure of your training session, your available training time, and the needs of your participant group.

How to Use the Customer Service Toolkit

Locate your main training topic in the Summary Table, select the segments to use, and then refer to the detailed Training Designs for each selected video segment. Or, make up your own questions and activities using the **Toolkit** segments as raw material.

Step 1

First, define your need for training.

- Do you have a changing mix of new employees and those who have been with your organization longer? Use the **Toolkit** to ensure everyone is "on the same page" and receives the same training.
- Have you noticed a pattern of easily corrected errors you need to address? The **Toolkit** has six categories that address specific needs of the customer service employee, supervisor, and department.
- Do you want to increase your team's level of expertise in handling more difficult problems or customer service challenges? Select a series of episodes to customize your training efforts to meet these challenges.

The **Toolkit** provides training components to meet these types of needs, with activities and discussion plans to help build participant understanding.

Step 2

Review the Summary Table on page 4, which lists the **Toolkit** video segments, organized by main topic area. Use the table to select video clips to meet your program's objectives.

The table includes:

- A brief overview of each clip and the customer service skills it illustrates.
- Other topic areas each clip can be applied to.
- The general category of the interaction: General Business/Retail, Government, or Healthcare.
- Whether the interaction is **on the phone** or **face-to-face**.

Step 3

Turn to the Training Designs that begin on page 22. You'll find more information about each segment, including Key Points, Discussion Questions (with possible responses), and Back at Your Desk activities.

View the video segments you've selected and read through the Training Designs.

Step 4

Plan your session.

- Order your selected clips in the most appropriate sequence.
- Modify the suggested discussion questions to meet your objectives and the time available for training.

Step 5

Conduct your session!

During the session, participants can use the **Customer Service Toolkit Worksheet** to take notes and record their responses to the Discussion Questions for each video clip covered in the session.

The worksheet can be found on page 176 of this Guide, or it can be printed from the CD-ROM (Customer_Service_Toolkit_Worksheet.doc). You can customize this worksheet by editing the Word document of it.

Step 6

Follow up.

In addition to the discussion questions, each Training Design includes Back at Your Desk activities for use by the participants after each session to help reinforce the training they've just received.

Summary Table

Use this Summary Table to choose **Toolkit** segments for your training program. Segments are listed in main categories, and include suggestions for alternate uses for some of the clips. Of course, many more combinations are possible.

For more detailed information about each clip, refer to the Training Designs that begin on page 22.

Step I

Clip	Clip Number In most cases, clips with an “a/b” designation include both positive and negative examples of the skill
Title and Contents	Title and overview of the contents of each segment
Page	Page number in this Guide where you can find the Training Design for this clip
Time	Running time of the video segment
Topic area	Focus of the segment: A = Attitude and Professionalism C= Communication PS = Problem Solving SR= Service Recovery SCS = Supervising Customer Service I = Internal Customer Service
Industry	The type of organization depicted in the clip: B = Business/Retail G = Government H = Healthcare
FTF or Phone	Face-to-face or Phone situation

Attitude and Professionalism		Focus										
Clip	Title and Contents	Page	Time	A	C	PS	SR	SCS	I	Industry	FTF/Phone	
1 a/b	Keep Gossip to Yourself In the first scene we see two stock clerks gossiping and a customer listening. In the second scene we see them wait to talk until they are alone.	22	a :36 b :23	X	X						B	FTF
2	I'm Outta Here In this scene we see an employee slack off because it is the end of the day.	24	:21	X							B	Phone
3	When Fast Isn't on the Menu In this scene we visit a fast food restaurant where a rude clerk delivers some very bad customer service.	26	:27	X			X				B	FTF
4	Ask Me If I Care In this scene we see a customer who has called ahead for a car repair appointment and arrived early, only to be treated rudely by a service representative.	28	:24	X							B	FTF
5 a/b	I'm Going on Break In the first scene we see how frustrating it can be for a grocery store customer to wait patiently and then be turned away. In the second scene a customer waits in line at the post office, only to have the line close in front of him.	30	a :29 b :23	X							B/G	FTF
6	It'll Be Ready When I Say It's Ready This scene shows a copier service technician who is rude and gives terrible customer service.	32	:37	X	X						B	FTF
7	Customers Reward Those Who Treat Them Well In this scene we see a hotel guest being treated like a king, and as a result he inquires about holding a company conference at the hotel.	34	1:07	X	X		X				B	FTF
8 a/b	Don't You Get the Message? In the first scene we see a woman who only answers the phone because she's tired of listening to it ring - and then she is rude to the customer. In the second scene we see her answer the phone promptly and display a professional and courteous attitude.	36	a :25 b: 34	X	X				X		B	Phone

	Attitude and Professionalism			Focus							
Clip	Title and Contents	Page	Time	A	C	PS	SR	SCS	I	Industry	FTF/Phone
9	If I May Be So Rude, Sir? In this scene a patient has an unpleasant experience checking in at the doctor's office.	38	:51	X	X					H	FTF
10 a/b	The Dog Gets More Attention Than I Do In the first scene, we see a dog receive excellent care at a vet's office. In the second part of the scene, we see his human owner receive less-than-stellar service at the doctor's office.	40	a :30 b 1:06	X			X			H	FTF
11	Be Glad They Didn't Operate In this scene a technician almost x-rays the wrong part of a patient's body, and then alarms the patient with personal stories and worst-case scenarios.	42	:50	X						H	FTF
12	Rudeness Is Not an Option In this scene a pharmacist is rude to a customer, who - it's probably safe to say - will not be returning.	44	:39	X						H	FTF
13	Slightly Rude Is Still Rude In this scene a nurse doesn't seem to be listening as a Hispanic family tells her about their father's pain.	46	:16	X						H	FTF
14 a/b	TMI – Too Much Information In the first scene we see nurses gossip in the elevator in front of a visitor. In the second scene they have their discussion in private.	48	a :25 b :15	X						H	FTF
15 a/b	Initial Patient Contact Isn't Medical – It's Clerical In the first scene we see Gladys being admitted in a disorganized and brusque manner. In the second scene we see a more relaxed and positive process.	50	a 1:13 b :51	X	X					H	FTF
16	Hey, Just Checking the Room In this scene a nurse barges in on a patient and then calls out her procedure to someone outside the room.	52	:14	X						H	FTF

Clip # 1a/b: Keep Gossip to Yourself

Length: a :36 b :23

Industry: Business/Retail

Useful for the following skills:

- ✓ Attitude and Professionalism
- ✓ Communication
 - Problem Solving
 - Service Recovery
 - Supervising the Customer Service Department
 - Internal Customer Service



Introduction

Everyone loves a good story, but gossiping about a co-worker in front of customers is a big No-No. In addition to not knowing who might be listening, such as a supervisor or family member of the person you're discussing, it is inconsiderate towards your customers. When two employees spend time gossiping – even while stocking the shelves – it means they aren't paying attention to what's going on around them.

In the first scene, a customer watches and listens to two employees, Mike and Toni, as they share the latest gossip about a co-worker. In the second scene, we see the young people realize they need to talk elsewhere.

Key Points to Draw from this Segment

- Never speak negatively about anyone or anything in front of a customer.
- Pay attention to your surroundings.
- Take personal discussions away from customers.

Discussion Questions

1. What was Toni's reaction when the customer asked for directions to the bedding department in the first scene?

POSSIBLE RESPONSES: She was embarrassed. She knew she had been gossiping in front of a customer and that it reflected poorly on her professionalism. Toni also recognized that if the woman overheard their conversation, lots of other people could also have heard it. There also seemed to be a little irritation in the customer's voice – perhaps she felt the two employees were too self-absorbed and were ignoring her on purpose.

2. *What was the difference in the second scene?*

POSSIBLE RESPONSES: When the conversation turned to gossip, Toni suggested they delay the chat. She was aware of her surroundings and tuned in to who was close by. This time, when the customer asked for directions to bedding, her voice was more casual, and she thanked Toni.

Back at Your Desk

It feels good to be part of the “in crowd” or to know something someone else doesn’t know. But, that attitude can catch up with you when you talk in public about your organization, co-workers, customers, etc.

Think of some subjects that other people would find troubling to hear you discuss in public and avoid these conversations:

- Religious beliefs
- Political statements
- Angry remarks of any sort
- Personal conversations, whether it be about last night’s party or a tattoo on the customer who just walked out
- Anyone’s children

Add to the list and practice awareness and sensitivity.

Customer Service Toolkit Content and Background

Designed to provide facilitators with options to make their training programs more relevant and versatile, the *Customer Service Toolkit* is a library of 72 short, high-quality video clips that can be used to enhance your organization's employee training courses. Because the clips illustrate basic customer service "do's and don'ts" in a variety of settings, they are applicable for all industries and can be incorporated into many types of courses, from new-hire CSR training to how to supervise customer service representatives.

The clips in the *Toolkit* cover 6 customer service skill categories:

- Attitude and Professionalism
- Communication
- Problem Solving
- Service Recovery
- Supervising a Customer Service Department
- Internal Customer Service

Materials Included With The Customer Service Toolkit

The program includes all the of the following materials:

- ◆ The chaptered **DVD** included in the *Customer Service Toolkit* includes 72 clips with running times of anywhere from 15 seconds to 2 minutes. On this DVD, each clip/vignette is chaptered separately and can be viewed in two formats: with or without narration. In the narrated versions, brief comments are provided before each scene to give a general idea of what to look for in the vignette. As the narration plays, key phrases and words are highlighted through on-screen graphics. The non-narrated version simply plays the video clip with no introduction.
- ◆ The **Leader's Guide** provides 2 pages of discussion topics and questions for each of the 72 clips. The Guide also includes reference tables that help you select clips by skill points, industry, or by whether the clip depicts a face-to-face or telephone customer interaction.
- ◆ The 2 **CD-ROMs** contains .mpg files of all clips (narrated and non-narrated), a pdf version of the Leader's Guide, a Flash tutorial on how to import the CD's video clips into PowerPoint, and an editable Word version of the Participant Worksheet.

Program Pricing

Total Running Time: approx. 75 minutes

Purchase Price: \$995 (Program not available for rental.)

Materials included with purchase: chaptered DVD, Leader's Guide one training design for each clip and a reproducible participant worksheet, 2 CD-ROMs with .mpgs of all clips.

Quantity Pricing Discounts

2 copies	10% off
3-5 copies	15% off
6-10 copies	20% off
11-15 copies	25% off

Industry discounts may also apply; call your Sales Consultant for more information.

(contents, pricing & discounts subject to change without notice)

Terms & Conditions and Usage FAQs

As with all CRM programs, the *Toolkit*, when purchased, is provided for long-term license purchase, which means that the buyer receives the nonexclusive right to use the materials for training of their internal employees only. The license entitles buyer to unlimited non-theatrical use (to which no admission is charged) via optical projection, conventional video/DVD playback. The video clips provided as .mpg files on the CD-ROMs are made available to insert the clips into a PowerPoint Presentation, but this is only for use by one trainer and cannot be transferred, sold or made available outside the organization. All other uses of the materials are prohibited unless special licensing agreements are made with CRM Learning. Purchasers may not rent, loan, alter, copy, transmit, recast or duplicate the materials—in whole or part—without CRM's prior written permission.

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