PROGRAM OVERVIEW

About the Training Program

In a world fraught with intense competition for savvy consumers, no business can afford to ignore the call for service and product excellence. Failure to heed the demand for quality in product design and delivery reads like a suicide plan for any modern business. Organizations interested in leading long and productive lives are returning in droves to the fundamentals of service excellence—providing customers with what they want, when and how they want it. Shrewd business leaders recognize the value of a high-caliber customer-service strategy. The rewards of service excellence are bountiful: satisfied, loyal customers; satisfied and loyal employees; a growing share of the market; and a stronger bottom line. High-caliber customer service pays and pays big.

This training program is designed for use in organizations ready to commit to customer service and those interested in renewing their dedication to service excellence. Leaders, managers, and front-line employees alike will benefit from the experiences provided. The program is designed to build an appreciation of the value of customer service and an awareness of the behaviors that attract and repel customers and to provide practice utilizing effective service behaviors, the opportunity to assess the organization’s current customer readiness, and a forum to allow for the planning of effective, long-lasting customer-service strategies.

Training Objectives

This program will provide participants with the following opportunities:

- To examine poor and positive customer-service practices;
- To assess the organization’s “customer-service climate”;
- To learn and practice effective customer-service behaviors; and
- To develop personal and organizational customer-service improvement plans.

Designed by Kim Stott.
# PROGRAM OUTLINE

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I. Opening Activities

A. Introduction (Presentation)

1. Introduce yourself and establish your credibility with participants by sharing your experience with customer service.

2. Review the training agenda and objectives. Program objectives include the following:

   - Examine poor and positive customer-service practices,
   - Assess the organization’s “customer-service climate,”
   - Learn and practice effective customer-service behaviors, and
   - Develop personal and organizational customer-service improvement plans.

B. Hocus Focus (Icebreaker)

1. Explain that you are introducing an activity commonly used by actors to help them relax and focus prior to performances. Tell the group that in this setting the activity is designed to focus the group on the learning ahead.

2. Divide the participants into subgroups of four members each. Ask for a volunteer subgroup to help you demonstrate the activity. Explain that the participants will be conducting a mirroring exercise. Face one of the volunteers and ask him or her to follow your lead. Begin by making a motion and instruct the participant to replicate your action. Continue with several more motions (e.g., rolling your head, waving, hopping). Next, ask a second group member to stand next to your partner and direct the member to begin to ask your partner simple math questions. Instruct your partner to continue mimicking your actions while responding to the other member’s questions. Allow time for several questions to be asked, then invite a third person to stand next to your partner, on his or her other side, and begin to ask simple trivia questions (e.g., the capital of Pennsylvania is . . .; the vice president of the United States is . . .). Direct your partner to continue mirroring you while responding to both the simple math and the trivia questions.

3. Thank the volunteers for their assistance and ask the larger group if there are any questions about the activity.

4. Tell participants that they will each have an opportunity to assume each of the four roles demonstrated: leader, follower, math examiner, and trivia pursuer. Let them know that they will have three minutes in each role.
5. Invite the subgroups to begin the focusing activity. Circulate through the room to observe and coach as needed. Time the groups, and instruct participants to switch roles after three minutes. Continue for twelve minutes, allowing each member the opportunity to act in each capacity.

6. After the allotted time, check to be sure that all participants have had an opportunity to act in each designated capacity; if not, allow time to complete the activity. When all the subgroups have finished, applaud participants’ creativity and focus. Invite participants to return to their seats and facilitate a discussion about the activity. Suggestions for processing follow:

- Ask participants for reactions to or feedback regarding the activity.
- Ask participants if they learned anything about themselves or their colleagues during the activity.
- Ask participants how this activity relates to the issue of customer service.

7. Conclude by explaining that high-caliber customer service requires undivided attention and the ability to juggle multiple demands, including those made by customers with many different needs.

C. Customer Service Audit (Writing Task; Materials: Form A)

1. Distribute copies of Form A. Introduce the questionnaire (with tongue in cheek) as a totally scientific tool designed to precisely gauge the customer-service climate/effectiveness of the participants’ organization. Explain that in order to know where we need to go, we need to know where we are today. This tool is designed to help tease out key information about where your organization is with regard to customer service.

2. Give attendees the following instructions: Read each item carefully. Rate each item using the four-point scale provided—scoring the item with a 4 if you strongly agree with the statement, 3 if you agree, 2 if you disagree, and 1 if you strongly disagree. When you have completed the audit, add together the items in each column, then add the column scores to get the total score. The last step is to divide the total score by ten to obtain the final score.

3. Ask participants to complete the survey and return it to you. Discourage talking among participants as they complete the form. Remain available during the process to answer questions regarding items on the survey.

4. Allow ten minutes for the completion of the audit; then explain that you will tally the results over lunch. Tell the group that you will revisit the findings later in the day.
II. Hallmarks of Customer Dis-Service

A. Customer Service Hall of Shame (Subgroup Discussion; Materials: Index Cards, Prizes)

1. Tell participants that one of the best ways to understand what others want and don’t want is to put ourselves in their shoes. Explain that every one of us is a customer every day. At least once a day, usually more, we are the recipients of goods and services. And just like our customers, we know what we want and how we want it. Just like our customers, we don’t always get what we want. Sometimes, we can’t even get what we need. And sometimes, trying to get what we want turns into our own personal nightmare.

2. Welcome participants to the Customer Service Hall of Shame. Divide participants into subgroups of four to six members each and give them the following instructions:

   • Explain that you want subgroup members to share with their subgroup their most awful, dreadful, horrible, worst-of-the-worst customer experiences. Direct them to share their stories, explaining to their team what happened, what made it a terrible experience, and what the results were (i.e., did they complain? did they take their business elsewhere? did they sue?).

   • Next, explain that each subgroup must choose the worst story of the bunch and give the story a title. The collective “horror story” will then be presented to the entire group and will be judged by the participants for its all around “horribleness.” Explain that subgroups will have approximately fifteen minutes to share their tales and to select the most terrible.

3. After approximately ten to twelve minutes, encourage the teams to begin the nomination process.

4. At the fifteen-minute mark, stop the subgroups and ask for volunteers to present their terrible tales to the entire group. Record each story’s name and pertinent information on a flip chart. (Note: You may need to prompt the storyteller to answer the questions “What made it the worst experience?” and “What were the results?”) Continue until all teams have presented.

5. Thank all the participants for their contributions and express your condolences for their traumatic experiences.

6. Distribute one index card to each person and ask participants to choose the story they think is the “worst of the worst.” Collect the cards and tally the votes. Announce the winning (worst) story to the group and award the grand prize (e.g., a toy trophy) to the winning team. Next, award consolation prizes (e.g., play money, candy) to all the other subgroups, explaining that everyone deserves some small form of compensation for their woes.
7. Process the activity with the entire group. Discussion questions might include the following:

- What can we learn about customer service from this activity?
- What do we want to avoid doing to our customers that was done to us?
- What will happen if we treat our customers badly?

■ B. Customer Dissatisfaction (Writing Task; Materials: Form B)

1. Distribute copies of Form B. Mention that one of the most compelling reasons for providing quality customer service is the serious impact that poor service has on the service provider.

2. Divide participants into pairs. Ask participants to take a few moments to answer the questions on the quiz.

3. Allow five minutes for participants to complete the quiz, then poll participants for their responses to each item. (*Note: Use Form B Answer Key to facilitate correct responses or to add to responses received.*)

4. Ask for personal examples that verify (or contradict) any of the outcomes described in the quiz. Facilitate a brief discussion regarding the implication of these research findings on an organization.

5. Conduct a brief presentation summarizing the points made in the quiz. Key points to cover might include the following:

- Satisfied customers become loyal patrons who sing your praises, tell others about your organization, and bring in more business. There is no better advertisement than a satisfied customer.

- Unhappy customers tell their stories over and over again. Not only do they frequently take their business elsewhere, but they take other customers with them and prevent potential customers from ever gracing your doorway. Dissatisfied customers are bad for business.

- “Feedback is a gift.” The customer quiz clearly illustrates the value of the complaint and the complainer to the organization. Customer complaints are opportunities to retain customers—golden opportunities to build a relationship, improve a process, and turn a potential loss into a major win: a loyal customer. When we listen to our customers and respond satisfactorily to their complaints, dissatisfied customers are very likely to remain customers.

- Silence is not golden in the world of customer service. Constantly checking in with customers to solicit their feedback regarding products or services they received is not just a luxury; it is a business necessity. Complaints not shared are likely to leave
with the silent, yet deeply dissatisfied customer, never to be seen or heard from again. It is imperative that people learn to ask for frequent feedback from customers.

6. Conclude by sharing one final statistic with the group: “Research demonstrates that it is five times more difficult to attract a customer than it is to retain one.”

■ **C. Dealing with Angry Customers (Panel Discussion)**

1. Explain to participants that customer relations often “heat up” and challenge our abilities to be responsive. As customer-oriented providers, our job is to remain cool, calm, and collected, no matter how hot our customers get. Dealing with dissatisfied customers requires skill, knowledge, and grace.

2. Mention that angry customers break our concentration, raise our stress level, and rob us of our effectiveness. They make it difficult for us to maintain our professionalism and our sanity.

3. Divide participants into subgroups of three to four members each. Ask the subgroups to discuss the following:

   • What tactics do angry customers use?
   • What can you do to keep yourself from becoming upset and unraveled?
   • How can you maximize the angry customer’s satisfaction?

4. After fifteen minutes, ask each subgroup to nominate one person to serve on a panel to discuss the previous questions. (If there are more than five subgroups, obtain up to five panelists from the entire group rather than nominees from each subgroup.)

5. Facilitate a panel discussion and obtain viewpoints.

■ **D. Satisfying the Dissatisfied (Role Play; Materials: Form C)**

1. Tell participants that they will now have the opportunity to practice satisfying the dissatisfied. Explain that, in addition to the multitude of strategies reviewed in the last activity, there are four basic service steps they can use in any challenging service situation. These include the following (list on newsprint):

   • **Hear the customer out**—Allow the customer the opportunity to let off steam and to air his or her complaints.

   • **Empathize**—Put yourself in the customer’s shoes. Demonstrate that you understand where he or she is coming from.
• **Apologize**—Apologize for the problem and the customer’s dissatisfaction (even if you don’t agree with him or her).

• **Take responsibility for action**—Work with the customer to find a solution to his or her problem. Take action to ensure that the solution is realized and the customer is satisfied with the outcome.

2. Distribute copies of Form C. Direct each participant to draw on his or her own experience with a particularly difficult, dissatisfied customer to create a role-play scenario. Allow ten minutes for scenario creation.

3. Divide the participants into trios and give the following instructions:

   • Each person will have the opportunity to act out his or her role play, playing the role of the service provider.

   • Trios must begin by deciding which member will enact his or her service scenario first, who will play the customer, and who will act as the observer.

   • Providers will introduce their scenarios, carefully explaining the customer role. The job of the provider is to do whatever it takes to satisfy the customer.

   • The job of the customer is to challenge the provider’s service skills.

   • Observers will watch the role play and furnish the provider with feedback about what the provider did that was effective and any suggestions for improvement he or she might have.

   • Each member will have ten minutes to explain and enact his or her scenario.

4. Circulate during the role plays to observe interactions.

5. After ten minutes, stop the groups and ask the customers and the observers to provide the service provider with feedback regarding his or her service satisfaction skills. Encourage providers to share their own impressions as well. What did they feel they did particularly well and what would they like to do better?

6. Allow fifteen minutes for the enactment and processing of each role play, then reconvene the entire group. Share your observations with the group and poll participants for reactions to the activity. Suggested questions for processing include the following:

   • Do you now feel more confident or better prepared to deal with difficult service situations? Why? Why not?

   • Did anyone learn any new service strategies they would like to share with the group?
III. Hallmarks of High-Caliber Customer Service

A. Customer Service Hall of Fame (Subgroup Discussion; Materials: Prizes)

1. Explain that participants should now have a pretty good idea about what they want to avoid doing to their customers. Mention that the group is going to focus its efforts for the rest of the day on developing positive customer relations.

2. Tell participants that they have already walked the shame gauntlet and now they are going to take a different route. They are going to walk the Hall of Fame. Divide participants into subgroups of four to six people each.

   - Explain that you want subgroup members to share their best, most terrific, most satisfying customer experiences with their group. Direct them to share their stories, explaining to their teams what happened, what made it a good experience, and what the results were (i.e., did they tell their friends? did they write a letter of thanks?).

   - Next, explain that each subgroup must choose the best story of the bunch and give the story a title. The collective “success story” will then be presented to the entire group and will be judged by the remaining participants. Explain that subgroups will have approximately fifteen minutes to share and select their terrific tales.

3. After approximately ten to twelve minutes, encourage teams to begin the nomination process.

4. At the fifteen-minute mark, stop the subgroups and ask for volunteers to present their tales to the entire group. Record each story’s name and pertinent information on a flip chart. (Note: You may need to prompt the storyteller to answer the questions “What made it the best experience?” and “What were the results?”) Continue until all teams have presented.

5. Thank all participants for their contributions and celebrate their good fortune.

6. Distribute one index card to each person and ask participants to choose the story they think is the “best of the best.” Collect the cards and tally the votes. Announce the winning story to the group and award the grand prize to the winning team. Next award honorable mention prizes to all other subgroups, explaining that everyone deserves to share in the celebration of quality customer service.

7. Process the activity with the entire group. Discussion questions might include the following:

   - What can we learn about customer service from this activity?
• What do we want to do to our customers that was done to us?
• What will happen if we treat our customers well?

■ **B. Service Steps (Dyadic Discussion)**

1. List on newsprint the following steps that demonstrate interest in and responsiveness to customers.
   • Acknowledge the customer
   • Clarify customer wants and needs
   • Meet or exceed the need
   • Confirm satisfaction

2. Divide participants into pairs and ask members to discuss the steps you have outlined and to develop concrete behaviors for each of the steps. Allow ten minutes for discussion.

3. Reconvene the entire group and ask for volunteers to share their concrete behaviors with the rest of the group. Encourage other participants to compare their behaviors with those of their peers and to add to or modify the definitions, if they wish. Attempt to generate a shared understanding of the steps among group members.

■ **C. Building Customer Loyalty (Subgroup Exchange)**

1. Write the following two questions on newsprint:
   • What does “putting the customer first” mean?
   • What is “customer loyalty”?

2. Divide the participants into two teams. Assign one question to each team. Provide each team with newsprint and markers and invite them to come up with as many answers for their question as possible in five minutes.

3. After the allotted time, reassemble the entire group and ask each team to report its answers. Reinforce the importance of meeting customer needs and satisfying expectations in order to retain customers and remain competitive.

4. Summarize the work of the groups by sharing the following quote from the popular book, *Service America* (Albrecht & Zemke, 1985):

   The three key factors about customer loyalty are that it is circumstantial, it is fragile, and it is fleeting. Loyalty begins to fade as the level of service declines below expectations. The customer wants and expects the service to be at a suitable level all of the
time. When the level of service no longer meets his or her expectations, the customer exercises other options, if they are available, and looks for satisfaction. That is not to say that the concept of customer loyalty is completely invalid, only that it must be based on a continuously satisfying level of service. (p. 49)

5. Stress the necessity of knowing the customers—their wants, needs, and expectations. Explain that participants will revisit this issue later in the program.

■ IV. Planning for Successful Service

■ A. The Service Imperative (Brainstorming)

1. Ask participants the question, “Why should your organization develop a customer focus?” Record responses on newsprint.

2. Follow the brainstorming session with a review of these key points:

   • Technology is advancing at an unprecedented rate. The information superhighway is speeding up the way we do business and pushing organizations to deliver products and services more quickly, efficiently, and better than ever before.

   • Customers today have many more provider choices than they did five, ten, or twenty years ago.

   • Competition for customers is stiff and very aggressive.

   • Consumers are much more sophisticated than at any other time in history. They know what they want, how they want it, and where to go to get it. If we cannot deliver, they are gone faster than we can count to three.

3. Explain that when organizations develop a customer focus and train employees to deliver high-caliber customer service, they can count on . . .

   • an increase in customer satisfaction. Organizations will keep customers and keep them happy, will bring in new customers, and will develop new customer markets.

   • an increase in their position in a competitive market, becoming market leaders.

   • an improvement in employee satisfaction.

■ B. Auditing the Audit (Group Discussion; Materials: Customer Service Audit Results Summary)

Note: Tally the results of the Customer Service Audit during the lunch break. Summarize the results on newsprint.
1. Tell participants that they are going to take a look at how they rated their organization’s customer readiness in the Customer Service Audit they completed earlier in the day. Explain that an important step in the development of any plan is a thorough assessment of the current state of affairs. Mention that the results of the audit will serve as the foundation for the planning activity to follow.

2. Reveal the results of the Customer Service Audit. (Note: Expect an element of surprise.) Allow time for participants to read through the summary. Make sure to point out the organization’s service strengths and to reinforce that the areas of weakness identified, like the negative feedback received from customers, are beacons of light guiding us in new and different directions. They provide us with the opportunity to improve our performance.

3. Provide an opportunity for participants to process their reactions to the results. Ask for comments, feedback, and surprises.

■ C. Commitment Feud (Game; Materials: Prepared Posters)

*Note:* This game is similar to the popular television game show, “Family Feud”. It requires advance preparation of three posters. Each poster should contain one of the following questions along with its answers:

**Question One:** What are some things that an organization does that indicate a lack of real commitment to a plan of action?

- Allocate no budget (35)
- Assign no one responsibility (20)
- Assign only people who “can be spared” (15)
- Isolate the plan from the mainstream (12)
- Execute no follow-up for results (10)
- Ignore the action when doing overall planning (8)

**Question Two:** What are some things that an organization does that appear to indicate a commitment to a plan of action but often do not really translate into commitment?

- Write it up in the organization’s newsletter (20)
- Reorganize (15)
- Hold meetings and discuss it (15)
- Send everyone a memo about it (15)
- Give one-day seminars about it (13)
• Offer prizes to those who “do better” (12)
• Put up posters (10)

**Question Three:** What are some things that an organization does that indicate real commitment to a plan of action?

• Allocate budget (20)
• Realistically assess barriers and plan for solutions (15)
• Develop a long-term plan (10)
• Put top-notch people in charge (10)
• Involve front-line employees in planning (10)
• Use experienced consultants during implementation (10)
• Develop phased and realistic expectations about results (10)
• Implement start-up and recurring training programs (10)
• Relate results to rewards/incentives (5)

Cover the answers with strips of paper so that you can reveal one answer at a time. The numbers in parentheses are the number of points the contestants will receive for choosing that answer.

1. Explain that there are a number of actions an organization can take to ensure the success of any plan it develops. Tell participants that you have designed a fun and unique way to share this important information with them and to prepare them for a successful planning session.

2. Tell participants that they are going to play “Commitment Feud,” a modified version of a popular game show with a similar name. Split the participants into two teams. Instruct each team to choose four contestants and a name for the team. Set up two tables so that contestants from each team face contestants from the opposing team. The audience should be able to see each of the contestants (i.e., no contestants should stand with their backs toward the audience). Encourage each team to root for its contestants and to offer suggestions to team members.

3. As the “host” or “hostess” of the game show, ask each team to select one member to begin. Flip a coin to determine which team will begin. That team will try to answer the question on the first poster (or “board”). If it guesses one of the answers on the board, uncover that answer and give that team the points shown in parentheses. This team will continue until it has offered three options not on the board. At that point, the other team gets one opportunity to name something on the board. If it guesses correctly, it resumes the play until it misses. The play rotates between the two sides in this manner. Teams will accumulate the points associated with each answer on the board.
4. The process is repeated as the contestants deal with the other two questions. Have fun with the game. Prompt, cajole, and applaud the efforts of the two teams.

5. Conclude by congratulating the winners and all players for their efforts.

**D. Creating Service Excellence (Creative Activity; Materials: Form D)**

1. Explain that the bulk of the time remaining in the program will be devoted to planning for service excellence. Distribute copies of Form D. Ask participants to read through it thoroughly.

2. Divide the participants into four to six subgroups. Provide each team with a piece of newsprint, markers, and tape. Explain that the teams’ job is to develop a service strategy—a list of actions their organization could take to improve its customer service. Tell participants that they can utilize any of the earlier handouts and the results of the customer-service audit as possible resources for the development of their plans. Direct teams to elect a recorder and a reporter. Encourage participants to let their “creative juices” flow during this activity. Ask team members to brainstorm ideas with their group, adding all ideas shared to their collective list. Remind participants not to judge or criticize any ideas shared. Instruct team recorders to write down each idea generated.

3. Allow twenty minutes for teams to develop their service plans. Reconvene the full group. Ask teams to post lists on the wall for all to see (with each next to the other to allow for comparison). Invite teams to share their strategies with the entire group. Encourage participants to ask questions and to seek clarification of any item included in a team’s plan.

**E. Finalizing the Plan (Group Discussion; Materials: Form E, 3” x 5” Cards)**

1. Commend participants for their thoroughness and thoughtfulness in the creation of their team plans. Explain that they are now going to attempt to narrow down the collective list and to create a shared plan, one which will direct their actions and permit them to begin to implement today’s learning when they return to the office.

2. Tell participants that they will have the opportunity to vote on the items they believe to be the most important for their organization, those items that they believe deserve the organization’s immediate attention.

3. Distribute copies of Form E. Ask participants to read through the items on the list and to discuss the five conditions of an effective service strategy with a seat partner. Encourage them to share questions about the handout with their partners. Allow five minutes for form review and discussion. (*Note:* While participants are reviewing and discussing the form, number the items on the team-generated lists posted on the
wall. To number properly, follow these guidelines: If the first list has ten items, number that list from 1 to 10; if the next list has fifteen items, then the first item on that list will be 11 and the last will be 25. Continue the process until each item on the team lists is numbered sequentially.

4. Inform participants that you are going to lead them in a multivoting exercise designed to help them reduce their lists to a few manageable, achievable items. Remind them that one of the things they can do to ensure the success of any plan is to make it simple and manageable.

5. Invite participants to utilize the information on their handout to guide their selections from the total list.

6. Review the items on each of the lists with the group. Ask participants to identify duplications among the items. Combine items that the group agrees are the same.

7. If necessary, renumber all ideas.

8. Distribute one 3" x 5" card to each participant. Allow each member the opportunity to make a number of choices equal to at least one-third of the total number of items on the list (i.e., a 48-item list = 16 choices; a 37-item list = 13 choices). Ask participants to choose the items they would like to see in the final plan by writing down the numbers of these items on the index card.

9. After all members have silently recorded their choices, tally the votes. You may let members vote by a show of hands as each item number is called out. You may also conduct the voting in secrecy by collecting the index cards and tallying the votes yourself.

10. To reduce the list, cross off those items with the fewest votes. (Note: Group size affects the results. A rule of thumb is if it is a small group, with five or fewer members, cross off items with only one or two votes. If it is a medium-sized group, with six to fifteen members, eliminate anything with three or fewer votes. If it is a large group, with more than fifteen members, eliminate items with four or fewer votes.) Remind participants that items eliminated during the voting process are not unimportant. They simply did not receive a great deal of attention in this activity. These items can be revisited at a later date and become part of a larger, long-term customer-service plan.

11. Repeat steps 7 through 10 on the remaining list with the choices reduced accordingly. Continue, as necessary, until only a few items remain.

12. Write the heading “OUR SERVICE STRATEGY” on a piece of flip-chart paper and record the remaining items beneath the heading.

13. Encourage participants to discuss and react to the items selected through the multivoting process.

14. Invite participants to commit to their collective service strategy by “signing on to the plan.” Encourage participants to join you at the front of the room to add their signatures to the plan.
15. Congratulate the participants for the development of and their commitment to the service strategy.

■ V. Closing Activities

■ A. Personal Barriers to Customer Service (Dyadic Exchange; Materials: Form F)

1. Review the program to this point. Remind participants that they have had the opportunity to do the following:

   • Explore the do’s and don’ts of customer service,
   • Develop and practice strategies to deal with difficult customer situations,
   • Assess the service strengths and weaknesses of their organization, and
   • Develop a service strategy for their organization.

2. Tell participants that they have one final and very important area to cover before parting—their own personal barriers to effective customer service.

3. Explain that sometimes, even the best, most customer-oriented employee does not operate at a “full service” level. On these days, or in these moments, we run the risk of alienating our customers, sending them into the open arms of our competitors.

4. Distribute copies of Form F.

5. Ask participants to review the list with a seat partner and to develop a list of more positive or supportive behavioral solutions than those described in the handout.

■ B. Personal Planning (Writing Activity; Materials: Forms F and G)

1. Ask participants to individually review the items on Form F. Instruct members to assess their own service readiness. Ask them to check off those items in the “bloopers” column that represent stumbling blocks to their own service excellence. Encourage participants to be honest in their assessments. Remind them that this information is personal and will not be shared with anyone else.

2. Distribute copies of Form G. Invite the participants to complete the form, utilizing the personal assessment they just finished to guide their decisions.

3. Ask participants to pair off one final time and to share their action plans with one another.
C. Service Slogans (Creative Activity; Materials: 8½" x 11" Paper, Markers)

1. Distribute paper and markers to participants. Invite them to think about the customer-service slogans and sayings that they are familiar with. Encourage them to call out some of these slogans (e.g., “the customer is always right,” “satisfaction guaranteed,” “if we don’t serve our customers, somebody else will,” “a company is known by the people it keeps”).

2. Persuade participants to generate their own funny, creative, or powerful slogans that will help employees maintain a focus on the importance and value of the customer or help to convey to customers their value to the organization.

3. As participants generate service slogans, ask them to hand them to you. Post them on the wall.

4. Allow approximately five minutes for slogan creation. Invite participants to review and react to the sayings generated by the group. Commend participants for their creativity.

5. End by conducting a mock customer-service awards ceremony, using certificates of attendance to honor participant contributions to the program.
## SATISFACTION GUARANTEED

**FORM A**

**Customer-Service Readiness: An Institutional Audit**

How well do you think you are serving your current customers? Rate your organization’s customer-service readiness according to the following four-point scale:

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

1. My organization regularly conducts customer-satisfaction surveys.

2. My organization includes customer-service standards in employee job descriptions.

3. My organization regularly assesses employees’ satisfaction with their work.

4. My organization’s employee evaluation and review system includes an assessment of the quality of employee-customer relations.

5. My organization includes customer-service training in its orientation program.

6. My organization’s quality activities are focused on improving services for customers.

7. My organization is a good place to work.

8. If I had a child or family member who was eligible for the services or products provided by my organization, I would want them to receive those services.

9. My organization provides employees with ongoing customer-service training.

10. When I need information or services from another department or unit, I receive what I need quickly.

___ ___ ___ ___ = ___________ TOTAL SCORE

Divide the total score by ten (10) = ___________ FINAL SCORE
Customer Quiz

1. What percentage of unhappy customers never complain?
   a. 56 percent
   b. 76 percent
   c. 86 percent
   d. 96 percent

2. True or False:
   People who don’t complain are more likely than people who do complain to do business with a company again.

3. The average customer tells _____ people about a service problem that he or she had with an organization.
   a. 3
   b. 7
   c. 12
   d. 15

4. The average customer tells _____ people about a company with which he or she has no complaints.
   a. 3
   b. 7
   c. 12
   d. 15

5. If a complaint is satisfactorily resolved, customers tell an average of _____ people about the treatment they received.
   a. 2
   b. 5
   c. 7
   d. 9

6. True or False:
   Almost all of the unhappy customers who don’t complain still take their business elsewhere.
Customer Quiz Key

1. What percentage of unhappy customers never complain?
   a. 56 percent
   b. 76 percent
   c. 86 percent
   d. 96 percent

2. True or False:
   People who don’t complain are more likely than people who do complain to do business with a company again.
   (False: Even if a problem is not satisfactorily resolved, complainers are more likely to stay and do business again than noncomplainers. Worry more about the quiet customers, not the vocal ones.)

3. The average customer tells _______ people about a service problem that he or she had with an organization.
   a. 3
   b. 7
   c. 12
   d. 15

4. The average customer tells _______ people about a company with which he or she has no complaints.
   a. 3
   b. 7
   c. 12
   d. 15

5. If a complaint is satisfactorily resolved, customers tell an average of _______ people about the treatment they received.
   a. 2
   b. 5
   c. 7
   d. 9

6. True or False:
   Almost all of the unhappy customers who don’t complain still take their business elsewhere.
   (True: 91 percent of unhappy customers who don’t complain take their business elsewhere and do not deal with that company again.)

Customer-Service Role Play

Directions: Recall a situation in the past where, in hindsight, a customer-service interaction did not go well. The situation may have involved a difficult customer, or it may have been “one of those days” for you. Briefly describe the situation below. Please select a situation in which you were the service provider.

- Your job/position in the situation:

- Describe the customer you were interacting with:

- Describe the outcome the customer expected:

- Describe the outcome you expected:

- What was the actual outcome?

- What went wrong?

- Use the space below to list any other key details not included in the questions above:
Creating a High-Caliber Customer-Service Organization

1. **Regularly evaluate service quality.**
   - Use a “report card” to assess customer satisfaction.
   - Define or discover the necessary quality criteria: What do our customers want, need, and expect from us?
   - Decide how to collect customer data (e.g., focus groups, surveys, site service audits, telephone interviews, personal interviews).
   - Analyze customer data for gaps and opportunities.

2. **Clarify the service strategy. Figure out how to get high marks.**
   Deal directly and openly with the key issues:
   - What is our business?
   - What really counts with the consumer today?
   - What does the market research data tell us about the customer’s real needs and purchasing tendencies?
   - Where is our real opportunity in the market?
   - What can we do with our service that the customer will really notice and pay for?
   - How does the customer currently see us?
   - What are we best known for?
   - In what ways do we excel?
   - What image and role in the market would be plausible to our customers?
   - How can we broaden or improve our image in the customer’s mind?

3. **Educate the organization. Preach and teach the gospel of service.**
   - No “smile training” (i.e., focus on fundamental, overall aspects of service rather than trivial and minor aspects of service).
   - Train all employees in job skills, knowledge of the total organization, the importance of service, and ways of helping customers.
• Empower employees to adequately serve customers. Inform employees of their level of authority and responsibility related to customer service.

4. **Implement new front-line tactics. Release grass-roots creativity.**

   • Ask all employees to define quality for themselves; invite and challenge them to find ways to maximize customer service.
   
   • Utilize quality-improvement activities to investigate, problem solve, innovate, and develop new methods to meet customer needs.

5. **Reinforce the new orientation and make it permanent.**

   • Make service commitment a way of life.
   
   • Ensure top-management involvement and commitment.
   
   • Provide ongoing service education.
   
   • Ensure that service is a part of the organization’s budget, planning, and compensation activities.

6. **Avoid**

   • “Quick kick in the butt” approaches with little or no real commitment or follow-up.
   
   • Empty slogans.
   
   • Brass bands.

Characteristics of an Effective Service Strategy

An effective service strategy is a statement of intent that meets at least the following conditions:

1. It is nontrivial; it has weight. It must be more than a statement or slogan. It must be reasonably concrete and action oriented.

2. It must convey a concept or a mission that people in the organization can understand, relate to, and somehow put into action.

3. It must offer or relate to a critical benefit that is important to the customer. It must add value to services provided and/or focus on something the customer is willing to pay for.

4. It must differentiate the organization in some meaningful way from its competitors in the eyes of the customer.

5. If at all possible, it should be simple, unitary, easy to put into words and action, and easy to explain to or demonstrate for the customer.

### SATISFACTION GUARANTEED

**FORM F**

*Service Blunders, Bloopers, and Busters*

<table>
<thead>
<tr>
<th>Blunders, Bloopers, &amp; Busters</th>
<th>Better Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>APATHY</td>
<td></td>
</tr>
<tr>
<td>THE BRUSH-OFF</td>
<td></td>
</tr>
<tr>
<td>COLDNESS/CURTNESNESS</td>
<td></td>
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<tr>
<td>CONDESCENSION</td>
<td></td>
</tr>
<tr>
<td>ROBOTISM/ROUTINE-ISM</td>
<td></td>
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<tr>
<td>RULEBOOK/RULEBOUND</td>
<td></td>
</tr>
<tr>
<td>RUNAROUND</td>
<td></td>
</tr>
<tr>
<td>UNRELIABLE</td>
<td></td>
</tr>
<tr>
<td>UNINFORMED</td>
<td></td>
</tr>
</tbody>
</table>

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*Satisfaction Guaranteed*
Personal Planning

Instructions: Take a few moments to reflect on the information, tips, and strategies we have covered today. Think about your own customer readiness. Identify what you do well and two areas that you would like to improve. Develop a personal action plan to accomplish these goals.

GOALS:

What I do well and plan to continue doing:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

One thing I want to improve is:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Another thing I want to improve is:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Signed: ________________________________________________________________

Date: ________________________________