

Design Document for PJ Enterprise

By ARBO, Inc.

Document Description

The Design Document is presented to the Management and Subject Matter Experts of PJ Enterprises in order to document the design plans for the Call Center Customer Service Delivery Training.

Purpose of the Course

The Call Center Customer Service Delivery class is designed to provide Customer Service training to the Customer Satisfaction Representatives so they have the skills necessary to meet the expectations of working as a Customer Satisfaction Representative in a Call Center and to create customer satisfaction and loyalty while minimizing the number of transfers to Supervisors.

Audience Description

The audience for this class is PJs Customer Satisfaction Representatives and Customer Satisfaction Supervisors.

Major Course Objectives

At the end of this course, learners will be able to:

- Meet the expectations outlined in the new Call Center Telephone Skills Training within three months of completing the training.
- Employ all the customer service skills outlined in the quality assurance evaluation form
- Employ appropriate customer service techniques when working with dissatisfied customers
- Complete the basic steps to process a Return Products request to minimize the number of transfers to Supervisors
- Satisfactorily meet the expectations outlined in the new evaluation form within three months of completing the training.
- Demonstrate all customer service skills outlined in the annual performance review.

Learning Assessment for Course

The learner assessment will be conducted at the end of the course and will consist of a customer call role-play. The assessor will read a script (see Appendix C) and portray the customer. The learner who is being assessed will use the skills learned in the course to complete the call with a successful order/return and a high level of customer satisfaction. Assessment of the learner's performance will be conducted based on the rubric included in Appendix C.

Instructional Strategies for Course

This class will be an instructor-led class, with a slide presentation, various flip charts and several exercises. The learners will experience guided discovery strategy. The learners are experienced customer service associates who will be able to learn from each other as well as the facilitator.

- Instructor-led Instruction (Directive)
- Role playing (Directive)
- Facilitative Discussion (Receptive)
- Scenario based exercises in which learners will create responses based on the skills learned in class (Exploratory)

Media

This course will utilize the following media:

- Course guide
- Instructor
- Question and answer exercises
- Slide presentation with graphics
- Flip charts
- Call examples
- MP4/WMV files of recorded calls in order to incorporate real life examples to enhance the learner's experience.

Development Tools

The course will be assembled and developed in:

- Microsoft Word
- Microsoft PowerPoint

Additional tools to be used are:

- Call monitoring system for calls
- Snipping Tool
- Hard copies
- In-person simulations
- Audio-recordings

Class/Seat Time of Course

The class takes 4 hours to complete.

Course Outline

This course will have 4 lessons, covering the following skills:

Lesson 1 - Class Introduction

- A. Facilitator's Introductions
- B. Class Objectives
- C. Class Introductions
 - i. Facilitated Activity

Lesson 2 - Delivering Best in Class Customer Service

- A. Lesson Introduction
 - i. Customer Loyalty Statistics
 - ii. The Human/Business Model
 - iii. A Beautiful Thing, the sound of one's name
- B. Standard Greeting, with a "Smile"
 - i. Practice
- C. Explanation Tips
 - i. Activity
- D. Call Hold or Transfer with Courtesy
 - i. Practice

- E. Clarifying the Request
 - i. Activity
- F. Confirming What You Are Going To Do
 - i. Activity
- G. Appreciation and Memorable Close
 - i. Practice

Lesson 3 - Managing an irate customer

- A. Lesson Introduction
- B. What the Customer Wants
- C. What Pushes Your Buttons?
- D. How to Listen Effectively
- E. Five Ways to Gain Cooperation
 - i. Show Empathy
 - ii. Watch Your Tone
 - iii. How to Say "No" Courteously
 - iv. Manage Call Time
 - v. Confirm Intentions
- F. xxx

Lesson 4 - Processing Product Returns

- A. Lesson Introduction
- B. Product Returns Procedure
- C. Questions to Ask the Customer
- D. Completing the Electronic Form
- E. When to escalate call to Supervisor
- F. Assessment activity?

Closing

- A. Role playing practice
- B. Role playing assessment

Development Time

80 hours

Support requirements

ARBO, Inc. will require support from PJ Enterprises as outlined in the Project Plan. This support includes signoffs from the project sponsor of major deliverables, communication in the form of emails and in-person meetings by key PJ personnel with key ARBO, Inc. personnel, revisions and reviews of deliverables by the SME team, participation in train-the-trainer courses by PJ facilitators, attendance of training courses by PJ Customer Satisfaction Representatives and Customer Satisfaction Supervisors , and facilitation of training courses by PJ facilitators.

Ownership

PJ Enterprises will retain ownership of the training course, including all training materials, after the completion of the current contract with ARBO, Inc. This ownership will entail modifications and updates to the training and all training materials to be performed by PJ Enterprises unless a new contract is signed with ARBO, Inc. at a later date.

