

Detailed Course Outline

	Mins	Task / Topic / Key Concept	Method	Objective	Assessment	Visuals / Media Support
1.	5	L1: An Introduction to Call Center Customer Service Delivery <ul style="list-style-type: none"> • Facilitator Introduction • Objectives 	Presentation of facts			
2.	10	<ul style="list-style-type: none"> • Participant Introductions 	Definition of concepts		Learners will be asked to introduce themselves and describe either one of their best or worst customer service call experience (as a customer)	2 Flip Charts (One Good, One Bad) As participant describes facilitator will paraphrase information on the corresponding flip chart. (These flip charts will be displayed and referred to while discussing individual skills and how those skills either were or were not used in these conversations)

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3.	5	<p>L2 – Best In Class Customer Service</p> <ul style="list-style-type: none"> • Introduction <ul style="list-style-type: none"> ○ Display statistics why customers are loyal to a company 	Presentation of Facts			Flip Chart with stats to be displayed for future reference
4.	5	<p>Introduction cont'd</p> <ul style="list-style-type: none"> • Introduction of Human/Business Model (see Appendix D for Facilitation Instructions) 	Definition of concepts	Given a customer's call, identify the impact of using the Human-Business Model in the conversation		Flip Chart with Human/Business Model information to be displayed for future reference
5.	2	<p>Introduction cont'd</p> <ul style="list-style-type: none"> • A Beautiful Thing, The Sound of One's name 	Facilitate Discussion definition of concept, cont'd.		The learners will be asked: Why is it important to use a customer's name? How does that fit into the Human/Business Model?	
6.	3	<p>Standard Greeting, with a "Smile"</p> <ul style="list-style-type: none"> • Impact of a message over the phone 	Definition of concept	Given a customer's call in a roll play, the learner will be able to answer the call using the appropriate tone setting standard greeting.	<p>Flip Chart with the impact of a message statistics will be posted</p> <p>87 % Voice Tone you use</p> <p>13% Words you use</p>	Flip Chart with Greeting information to be displayed for future reference

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	10	<p>Standard Greeting cont'd</p> <ul style="list-style-type: none"> Greeting (Tone Setting) Company Name Personal Name Willingness to Help Question <p>Example: "Good afternoon. PJ Enterprise. This is Julie. How may I help you?"</p>	Presentation of Facts		Learners will find a partner. They will be asked to roll play one inappropriate greeting and one appropriate greeting each.	Flip Chart of Standard Greeting to be displayed for future reference
7.	10	<p>Explanation Tips</p> <ul style="list-style-type: none"> Avoid using jargon and company terminology not familiar to the customer Explain enough for the customer to understand but not so much as to overwhelm the customer. Keep the customer's perspective in mind. Keeping the customer up-to-date on what you are doing "behind-the-scenes" to prevent, or at least minimize "dead air". <p>Example: "FOB is an acronym for Federal Online Bank which is the company JP uses to process customer payments."</p>	Presentation of Facts	Given an example of a customer's call, the learner will be able to identify bad explanation skills and write how they can be improved.	Facilitator will display Explanation Flip chart displaying Tips for good explanation skills. Learner will listen to a recorded call demonstrating a bad example of the explanation skill. They will be asked to identify how the representative could have improved the experience using better explanation skills.	<p>Flip Chart of Explanation Tips to be displayed for future reference</p> <p>Call Recording</p>

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8.	10	<p>Call Hold or Transfer with Courtesy</p> <ul style="list-style-type: none"> • Ask the customer for permission before putting them on Hold, return to the call as soon as possible. If the call is taking longer than expected, return to the caller and ask permission to continue to hold or if they would prefer being called back. • Warm Transfers should be used when possible to transfer the customer to another associate for assistance. <ol style="list-style-type: none"> 1. Explain reason for transfer 2. Press the “Conf” button on the phone and dial extension 3. Explain the customer’s situation to the person you are transferring the call (so the customer won’t have repeat information) 4. Press “Conf” to bring the customer into a 3 way call and validate they are both connected 5. End call to allow customer and associate to continue the call 	Demonstration of procedure	Given a customer call roll play, the learner will be able to correctly complete a warm transfer.	<p>The Learners will partner with two other learners. Each group will be provided a non-operable phone for them to use to roll play a warm transfer.</p> <p>Learners will take turns in each of the roles, Transfer from Representative, Customer and Transfer to Representative</p>	Flip Chart with Hold and Warm Transfer information to be displayed for future reference

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9.	10	<p>Clarifying the Request</p> <p>Using the Clarification skill can help clarify the content of the customer's inquiry. The employee should take full responsibility for understanding the message.</p> <ul style="list-style-type: none"> • "Let me make sure I understand..." • "Let me make sure I am getting the information correct..." • "What I am hearing you say is..." <p>Example: "Let me make sure I understand your request. You want to have three teddy bears shipped to one address and 5 to another address?"</p>	Definition of principle-based task	Given a list of customer call scenarios, the learners will be able to use the clarification skills to respond to a confusing question.	Learners will be given a list of confusing customer statements. They will partner with another learner. Each learner will alternate asking the confusing question and the other learner will provide a response taking responsibility for clarifying.	Flip Chart with Clarification information to be displayed for future reference

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10.	10	<p>Confirming What You are Going to Do</p> <p>The confirmation skill can be used to build credibility and help customers feel confident that the solution will be professionally delivered.</p> <ul style="list-style-type: none"> • Who – will be assigned to meet the customer’s needs • What – specifically will be done to fulfill the customer’s needs • When – will the interaction/situation take place? (day, time, etc.) • How – specifically how will it be done? <p>Example: Sheena will call you within the hour to provide you with the information you requested.</p>	Definition of concepts	Given a list of statements containing confirming information, some with missing confirming parts, the Learner will be able to identify if a part is missing and, if so, which part is missing.	<p>Learners will partner with another learner and will be provided with a list of Confirmation Statements, some will have missing parts. Each Statement will have the words written underneath:</p> <ul style="list-style-type: none"> • Who • What • When • How • Nothing missing <p>Learners will partner with another learner and together they will identify if there is a missing part by selecting the correct answer for each.</p>	Flip Chart with Confirmation information to be displayed for future reference

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11.	5	<p>Appreciation and Memorable Close</p> <p>Appreciation shows gratitude for the customer and may center on one of the below, based on the circumstances:</p> <ul style="list-style-type: none"> • The customer’s business • The customer’s patience or cooperation • An assistance the customer has provided to the employee <p>Example: “Thank you for ordering from PJ, Enterprise, we appreciate your business.”</p>	Demonstration of principle-based task.			
12.	5	<p>Appreciation and Memorable Close cont’d</p> <p>A Memorable Close is a way to end the call with a personal touch. Picking up on something that was said in the conversation and commenting on it just before you end the call</p> <p>Example, “I hope your Grandson enjoys the teddy bear”.</p>		Given a customer’s call in a roll play, the learner will be able to differentiate between a bad and good closing.	Learners will find a partner. They will be asked to roll play one inappropriate greeting and one appropriate greeting each.	