

# Customer Service Training Facilitator Guide

## Team 3





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# Instructor Information

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## Using the Guide

This guide is intended to aid you in the facilitation of PJ Enterprises customer service training, developed by Instructional Design Solutions. Facilitators are encouraged to incorporate their own leadership style when facilitating the training and practice strong presentation skills as well as small and large group communication skills.

## Course Description

This course includes two parts—catalog launch training and customer service training for both Telephone Operators and Supervisors. The trainings cover tasks operators would perform daily including customer service protocols, general customer service guidelines, and how to conduct customer orders and returns.

The trainings are interactive and include numerous opportunities for demonstration, practice, scenarios, assessments and quizzes to familiarize staff with the new product database and to help staff respond to telephone orders more efficiently. The training includes basic customer service, telephone etiquette, and how to handle common customer concerns. A supplemental lesson for supervisors will be developed to teach basic supervisory skills. In this way, the training can be targeted for the specific audience's needs.

## Audience Information

Current telephone operators are all women between 18-65 years of age, with the smallest number in the 35-55 range. Some operators have had prior telephone experience, but for many, this is their first job. All telephone operators have completed high school or a GED and a few have some college credits. None of the telephone operators have received training in this company outside of new-product training. The average time telephone operators have spent with the company is between two and 10 months.

Supervisors were promoted from the ranks of the telephone operators based on their performance, particularly in sales; therefore, they fall into the same demographic as telephone operators in that they are all women and have completed high school or a GED. They have received very little training on how to supervise.

## Objectives

At the end of the Catalog Launch and Customer Service training, learners will be able to:

- Use proper etiquette to greet customers when answering the phone
- Use customer service protocols with no errors
- Respond to customers' questions or concerns within the accepted guidelines with no errors
- Use the approved guidelines to resolve a customer's complaint with no errors
- Demonstrate the proper guidelines for up selling products with no errors
- Differentiate between and employ different types of questions
- Use proper etiquette to end a call with customers
- Resolve a conflict within the approved guidelines with no errors

- ❑ Supervisors will address telephone operator policy violations within the approved guidelines with no errors
- ❑ Supervisors will address common telephone operator behavioral issues within the approved guidelines with no errors
- ❑ Update customer records with no errors
- ❑ Supervisors will mediate conflict between telephone operators within the approved guidelines with no errors
- ❑ Supervisors will conduct performance reviews of telephone operators within the approved guidelines with no errors

## Lessons

The course outline was developed to incorporate training and base knowledge relevant to both Telephone Operator and Customer Service Supervisor roles within the organization.

- ❑ Course Overview
- ❑ Lesson 1: PJE Customer Service Protocols
- ❑ Lesson 2: General Customer Service Procedures
- ❑ Lesson 3: Customer Orders and Returns
- ❑ Lesson 4: Train-the-Trainer for Customer Service Supervisors

## Course Seat Time

This course is instructor-led and totals eight hours in length. For a complete Agenda Outline / Timeline of today's training see Appendix B.

## Preparation Checklist

### One Week Before Training

- ❑ Review facilitator guide
- ❑ Become familiar with course concepts and activities
- ❑ Make notations as appropriate
- ❑ Check all electronic resources
- ❑ Make required handouts
- ❑ Create packets for learners
- ❑ Contact appropriate administrative staff and/or training developers with any questions or concerns

### One Day Before Training

- ❑ Review facilitator guide
- ❑ Make final notations as appropriate
- ❑ Confirm training site information and specifications
  - Confirm location and time
  - Workstations
  - Conference room
  - Internet-enable computers
  - Facilitator computer with projector, screen, and PowerPoint\
  - System login information/access
  - Snacks, drinks, and meals

- ❑ Confirm attendee registration
- ❑ Check all electronic resources

### **Day of Training**

- ❑ Check equipment and technology minimum one hour prior to training
- ❑ Check set-up of training site per list in day-before-training checklist
- ❑ Check training site logistics
  - Lighting
  - Test login to computers and facilitator computer station
  - Check lighting, temperature, accessibility of training room
- ❑ Note attendance
- ❑ Facilitate training

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# Class Overview

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Time: 30 min.

**Welcome:** the students to the training.



## Welcome

Welcome to the Catalog Launch and Customer Service Training





**Go over:** administrative details

**Let them know:** that the training lasts a total of eight hours and is composed of five lessons.

**Tell:** them that they will get a 15 minute break after each lesson and a longer 30 minute lunch break midway through the training.

**Explain:** that refreshments are provided, that they can ask questions at any time, and that all cell phones should be silenced at this time.



## Administrative Details

Your instructor will let you know the following administrative details:

- The location of restrooms if the training is held away from PJ Enterprises.
- Training will last eight hours and will cover four lessons.
- You will get a 15 minute break after each lesson.
- Lunch will be catered and last approximately 30 minutes.
- Refreshments are provided.
- You can ask questions at any time.
- All cell phones should be silenced at this time.

A graphic representing a slide titled "Administrative Details". It features a decorative vertical bar on the left with overlapping circles and a blue dot. The title "Administrative Details" is in a dark brown font. Below the title is a bulleted list of items.

**Administrative Details**

- Attendance Sheet
- Length of training
- Breaks & refreshments
- Lunch
- Asking Questions
- Cell Phone use

**Introduce:** yourself and your fellow facilitators. Let the audience know your position and how many years you have worked for PJ Enterprises.

**Tell:** participants to introduce themselves using the information on the slide.



## Introductions

Your instructor will introduce her/himself first and then you will introduce yourself by giving the following information:

- Your name
- Your position at PJ Enterprises
- Your background and experience
- How long you've been with PJ Enterprises

**Introductions**

- Instructor
- Participants
  - Name
  - Position
  - Background and Experience
  - How long you've been with PJ Enterprises

**Explain:** the purpose of the training.



## Purpose of Training

The purpose of this training is to provide you with PJ Enterprise's standards of customer service and to teach you how to use the new product guide database.

To assist you in these efforts, the training will give you plenty of opportunities for practice so you will learn and retain the essential skills needed for interacting with customers.

With this course in place you will be able to respond to telephone orders more efficiently, which helps PJ Enterprises achieve its business goals and ensures its profitability.

**Purpose of Training**

- Provide training on the standards of customer Service
- Provide practice for learning the essential skills needed to perform job at PJ Enterprises
- Teach you how to use the new product guide database
- Help PJ Enterprises reach its business goals

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**Tell:** them that there is no specific pre-requisite for this course, because the material covers entry-level skills or new procedures.

**Say:** that those with some prior experience or who have been with the company a while will have knowledge and skills they can develop further.



### **Pre-requisites of Training**

There are no pre-requisites for this course. If you have prior customer service and/or call-center experience, you already have some good skills to help you master this training.

A slide with a light beige background and a vertical decorative bar on the left side. The bar contains a circular graphic with a blue dot. The slide title is "Pre-requisites" in a dark font. Below the title are two bullet points: "• No prior experience is required" and "• Material is new or essential skills".

**Pre-requisites**

- No prior experience is required
- Material is new or essential skills

**Tell:** them the objectives for the course.



## Course Objectives (Everyone)

At the end of this training, you will be able to:

- Use proper etiquette to greet customers when answering the phone
- Use customer service protocols with no errors
- Respond to customers' questions or concerns within the accepted guidelines with no errors
- Use the approved guidelines to resolve a customer's complaint with no errors
- Up sell a product using the approved guidelines with no errors
- Differentiate between different types of questions
- Employ different types of questions
- Use proper etiquette to end a call with customers

A graphic box with a light beige background and a decorative vertical bar on the left side. The bar features overlapping circles and a blue dot. The title 'Course Objectives' is written in a bold, dark font. Below the title is a bulleted list of the same objectives as in the main text.

**Course Objectives**

- Use proper etiquette to greet customers when answering the phone
- Use customer service protocols with no errors
- Respond to customers' questions or concerns within the accepted guidelines with no errors
- Use the approved guidelines to resolve a customer's complaint with no errors
- Up sell a product using the approved guidelines with no errors
- Differentiate between different types of questions
- Employ different types of questions
- Use proper etiquette to end a call with customers

**Tell:** them that in addition to the objectives on the previous slide, the following objectives pertain specifically to supervisors.



## Course Objectives for Supervisors

At the end of this training, you will be able to:

- Resolve a conflict within the approved guidelines with no errors
- Address a policy violation within the approved guidelines with no errors
- Address a common behavioral issue within the approved guidelines with no errors
- Update customer records with no errors
- Mediate a conflict within the approved guidelines with no errors
- Conduct a performance review within the approved guidelines with no errors

**Course Objectives for Supervisors**

- Resolve a conflict within the approved guidelines with no errors
- Address a policy violation within the approved guidelines with no errors
- Address a common behavioral issue within the approved guidelines with no errors
- Update customer records with no errors
- Mediate a conflict within the approved guidelines with no errors
- Conduct a performance review within the approved guidelines with no errors

**Explain:** the organization of the training and the agenda.

**Go over:** the lessons the participants will attend.

**Let them know:** that everyone will attend the first three lessons And that the last lesson is only for supervisors.



## Organization of Training & Agenda

The training is organized into four lessons. Everyone will participate in the first three lessons, but only the supervisors will take part in the last lesson.

Plenary lessons:

- Lesson 1: Customer Service Protocols
- Lesson 2: General Customer Service Procedures
- Lesson 3: Customer Orders and Returns

Supervisors only:

- Lesson 4: Train-the-Trainer for Customer Service Supervisors

### Organization of Training & Agenda

Everyone will participate in the following lessons:

- Lesson 1: Customer Service Protocols
- Lesson 2: General Customer Service Procedures
- Lesson 3: Customer Orders and Returns

Only supervisors will participate in:

- Lesson 4: Train-the-Trainer for Customer Service Supervisors

**Ask:** attendees if they have any questions



## Questions

What questions do you have before we move on?

A rectangular graphic with a light beige vertical bar on the left side. The word "Questions" is written in a dark brown font, with a small blue question mark icon to its left. Below the title, the text "Are there any questions before we move on?" is displayed. At the bottom center, there is a yellow emoji with a thinking expression, its hand on its chin, and two blue question marks floating above its head.

**Questions**  
Are there any questions before we move on?

A yellow emoji with a thinking expression, its hand on its chin, and two blue question marks floating above its head.



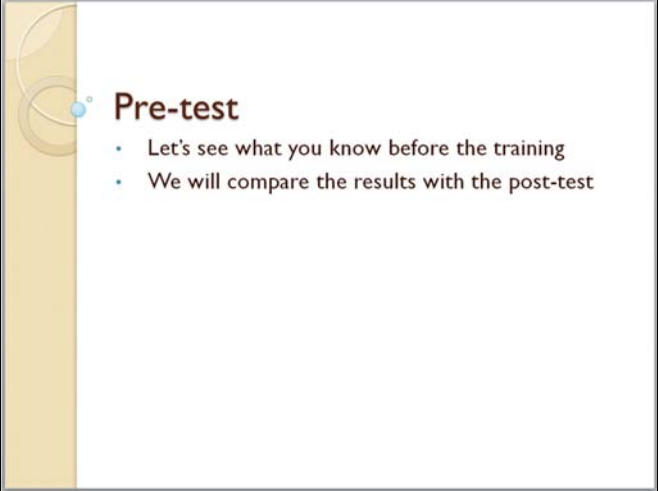
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**Distribute:** a pretest to assess what the attendees know and what you should focus on.

**You will:** look over and assess the pretests at the break.

## **Pretest**

Now, you are going to take a pretest to see what you already know and what we need to focus on. You'll find the pretest on page 33as Appendix A.



**Pre-test**

- Let's see what you know before the training
- We will compare the results with the post-test

# Lesson 3b: Answering the Phone

Time: 30 min.

## Introduction

**Tell:** them that answering the phone properly is important to any employee in a call-center in that it is what drives PJ Enterprises business.



### Introduction

Now that you know what this training will cover, let's get started by learning one of the most basic tasks you complete daily—answering the phone. It's also a task that you must master because it is so vital to PJ Enterprises.

**Lesson 3B: Answering the Phone**

Objectives

- Use proper procedures to connect to a call
- Greet customers when answering the phone
- Identify the nature of the call

**Explain:** that understanding how to connect the call in a timely manner and to answer the phone with proper etiquette is important in establishing a good rapport with the customer.

### Importance

Answering the phone is a fundamental task that most of us do without much thought, but in a call center it's important to connect to the call quickly using a courteous and respectful greeting and to ask the right questions so you can figure out the nature of the customer's call.

**Provide:** a brief overview of the lesson.

### Overview

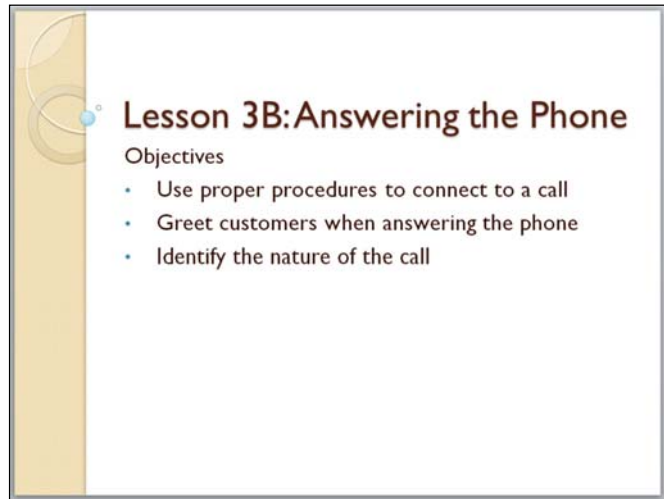
In this lesson, you will discover how to properly prepare and connect to a call, use a proper greeting, and investigate the nature of the call.

**Tell:** them what they'll be doing in this lesson, and stress how important it is, but also tell them they will have fun learning about it.



## Objectives

In this lesson, you'll learn how to:

A presentation slide with a light beige background and a vertical gold bar on the left. The title is "Lesson 3B: Answering the Phone" in a dark brown font. Below the title, the word "Objectives" is written in a smaller font. A bulleted list follows, containing three items: "Use proper procedures to connect to a call", "Greet customers when answering the phone", and "Identify the nature of the call".

**Lesson 3B: Answering the Phone**

Objectives

- Use proper procedures to connect to a call
- Greet customers when answering the phone
- Identify the nature of the call



## Topics

This lesson includes the following topics:

	<b>Topic</b>	<b>Page</b>
1	Introduction	11
2	Connecting to the Call	13
3	Greeting Customers	15
4	Investigating the Nature of the Call	18
5	Role Play	19
6	Summary	20

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## Connecting to the Call

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**Tell:** them that connecting to the call quickly is an important first step for providing excellent customer service. Typically, customers don't like to wait long in queue.

**Explain:** that following stepwise procedure is essential for answering calls quickly and efficiently.



### Introduction

Providing the best customer service begins with promptly connecting to a call. Customers typically don't like to be kept waiting too long, so you must make sure you are prepared to take calls and connect to them promptly. Following a step-wise procedure each time you start your shift will help you.

**Go over:** the procedure for preparing to connect to a call and connecting to the call.

**Explain:** to them that preparing to connect is vital for connecting to incoming calls.

## Incoming Call Procedure

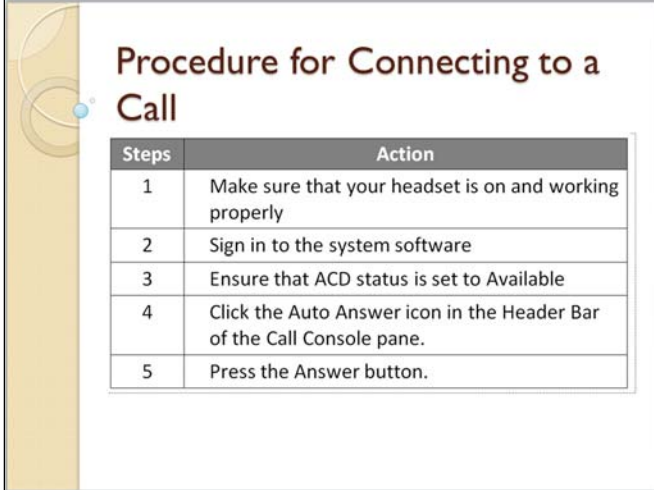
PJ Enterprises uses a system that routes calls automatically to your station. In order for this system to work properly, you must follow these steps:

1. Make sure that your headset is on and working properly.
2. Sign in to the system software with your user name and password. You will automatically be taken to the Call Center interface screen.
3. Ensure that ACD status is set to **Available**.
4. Click the **Auto Answer** icon in the Header Bar of the Call Console pane.

The blue square inside the icon indicates that Auto Answer is on and you are ready to receive calls.

When you receive a call, the **Incoming Call** icon will flash and you will hear a ring tone in your headset.

5. To connect to the incoming call, press the **Answer** button.



**Procedure for Connecting to a Call**

Steps	Action
1	Make sure that your headset is on and working properly
2	Sign in to the system software
3	Ensure that ACD status is set to Available
4	Click the Auto Answer icon in the Header Bar of the Call Console pane.
5	Press the Answer button.

For a job aid for this procedure, see Appendix C.

## Greeting Customers

**Tell:** them that the greeting is the first form of contact customers have when they reach you at the company.

**Explain:** that it is important to speak clearly and in a pleasant tone because it sets up the rest of the call.



### Introduction

Now that you know how to connect to a call, the next step is to greet the customer in a pleasant, yet enthusiastic voice.

The greeting articulates the company's brand. It is your first interaction with the customer, so making a good first impression is vital for the customer experience and how you interact with the customer for the rest of the call.

**Go over:** the elements of a standard greeting.

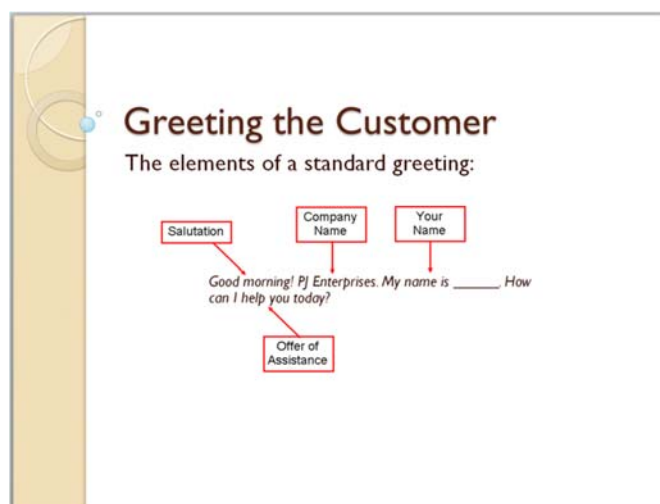


### Greeting the Customer

Typically, a standard greeting contains the following elements:

- A salutation
- The company's name
- Your name (and title for supervisors)
- An offer of assistance

*Hello, PJ Enterprises. My name is \_\_\_\_\_. How can I help you today?*



**Go over:** guidelines for delivering a standard greeting.

**Explain:** that the first few words customers hear, help build a rapport with the customer and make them feel welcome. It creates a lasting impression on the customer about how they feel about the company which can reinforce brand awareness.

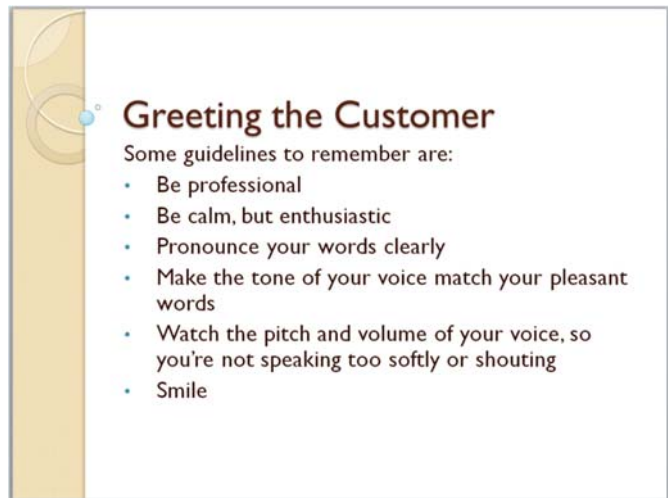
**Let them know:** that they should relax and always remain professional and in control. They should pay attention to volume, tone and the overall quality of their voice.

## Greeting the Customer, continued

It's important to know the guidelines PJ Enterprises has developed for answering a call. Using these guidelines will help you create rapport with the customer and make them feel welcome.

When greeting a customer, some guidelines to remember are:

- Be professional
- Be calm, but enthusiastic
- Pronounce your words clearly
- Make the tone of your voice match the pleasantness of your message
- Watch the pitch and volume of your voice, so you're not speaking too softly or shouting
- Smile to set the mood



**Greeting the Customer**

Some guidelines to remember are:

- Be professional
- Be calm, but enthusiastic
- Pronounce your words clearly
- Make the tone of your voice match your pleasant words
- Watch the pitch and volume of your voice, so you're not speaking too softly or shouting
- Smile

**Tell:** them that it's time for them to try it.

**Explain:** that they will partner with someone in the class and take turns using the standard greeting and guidelines.

**Tell:** them to take notes to critique their partner.

**Discuss:** the role play when they've finished.



## Role Play

Now it's your turn. With a partner, take turns greeting one another using the standard greeting and guidelines.

Take notes and write down one positive thing and one thing you think your partner could improve on. When you have finished, discuss your notes in class.

**Role Play**

- Partner with someone next to you
- Take turns greeting one another using the standard greeting and guidelines
- Take notes and write down one positive thing and one thing you think your partner could improve on.
- When you have finished, we will discuss your notes in class

**Discuss:** the role play when they've finished.

**Ask:** what was positive.

**Ask:** what was negative.

**Give:** feedback on the most common positive and negative aspects and ways to improve.



## Debrief

What was the easiest part of the role play?

What was most difficult?

What feedback did you get from your "customer?"

What questions do you have?



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## Investigating the Nature of the Call

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**Tell:** them that are ready to explore the nature of the call.

**Go over:** the common types of calls that they will receive.

**Explain:** that more than 80% of all calls fall into these four categories.



### Introduction

Now that you know how to greet a customer properly, the next step is to determine the nature of their call.

Customers can call for numerous reasons, but the most common types of calls you receive are from customers who want to

- Place a new order
- Change an existing order
- Track an order
- Return an item

**Investigating the Nature of the Call**

The most common types of calls you will receive are from customers who want to

- Place a new order
- Change an existing order
- Track an order
- Return an item

**Explain:** that a good greeting goes a long way in helping them determine the nature of the call.



### Investigating the Nature of the Call

The primary reason you use a standard greeting is to include an offer of assistance such as “How can I help you?” Typically when you offer to assist the customer, they will tell you why they have called.

If the nature of their call is not clear or falls outside of the most common types, ask clarifying questions to help you determine the reason they called. You will learn more about asking clarifying questions in a lesson later in this course.

**Explain:** the rules of the role play. Take turns playing the role of the customer and the operator.

**Tell:** them that they must complete the task without error



## Putting it all Together

Now it's your turn to answer a call. The class will separate into two groups. One half will be customers, while the other half will take a call.

If you're an operator, your instructions are to log into one of the computers and answer a call with the use of your job aid from topic one (see Appendix C), give a standard greeting, and determine the nature of the call.

You must complete this task without error. "Customers" will take notes to determine whether you pass or fail

When you have finished, show your notes to your instructor and assume the role of the other player.

If you fail the first time, assume the role as the customer and then try again as the operator.

**Role Play**

- Separate into two groups
- Take turns assuming the role of the customer and the operator
- Use the job aid to log into the system and prepare to take calls
- Answer a call using a standard greeting and guidelines
- Take notes and determine if the operator passed or failed.
- Take as many turns as necessary to pass

**Go over:** the correct procedure for answering a call.

**Discuss:** the exercise in terms of what was easy and difficult.

**Ask:** if anyone has questions.



## Debrief and Questions

What did you find easy about this exercise?

What were your challenges?

Do you have any questions?

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## Summary

Tell: them what they learned in the lesson and review the lesson objectives.



### Summary

In this lesson, you learned how to answer a call properly by logging into the system and preparing to take calls, answering a call using the proper greeting, and identified the nature of the call.

# Lesson 3d: Asking Questions

Time: 60 min.

## Introduction

**Introduction:** Introduce the subject of the presentation.

**Explain:** how the presentation will benefit the audience.

**Tell:** them your level of expertise on the subject.

**Review:** the Investigating the Nature of a Call section to build the connection with this lesson using the transition at the right.



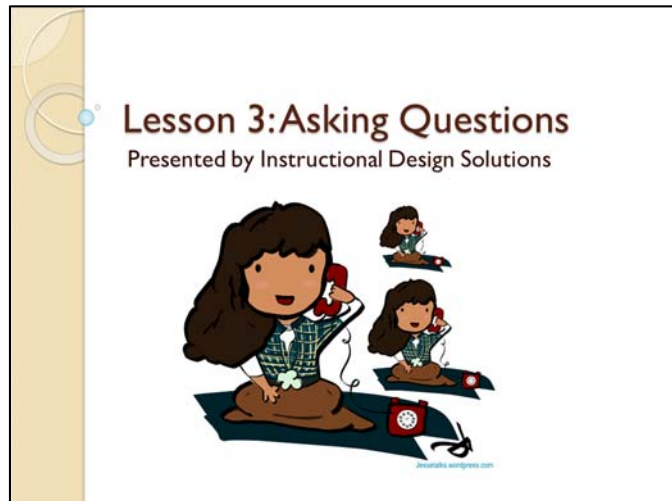
## Introduction


In the investigating the nature of call part, you have learned that a good greeting goes a long way in helping determine the nature of calls.

In this lesson, you'll learn The importance of asking questions

- Three types of questions and examples

Asking appropriate questions to determine the customer's needs so you can provide great customer service and support.



<p><b>Explain:</b> how asking the right questions is an important strategy for providing good customer service.</p> <p><b>Remind:</b> them that the purpose of the training is to teach and ensure that the learners can utilize what they learned.</p> <p>The assessment needs to be aligned with the teaching objectives so that the learners understand the concepts and can utilize the learned knowledge right away.</p>	<p><b>Importance</b></p> <p>As you saw in a previous lesson, a good greeting goes a long way in helping to determine the nature of a customer’s call. However, customers often need more specialized assistance. When they do, asking questions is an important step to build a good relationship with the customers.</p>
<p><b>Provide (briefly):</b> an overview of the lesson</p>	<p><b>Overview</b></p>
<p><b>Tell:</b> the learners about the learning outcome so they’re motivated to engage in the learning process.</p>	<p> <b>Objectives</b></p> <p>By the end of the lesson, you will be able to</p> <ul style="list-style-type: none"> <li>• Use a variety of questions to determine customer needs without escalation to customer service in 80% of the calls.</li> </ul> <div data-bbox="764 1041 1425 1535" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><b>Lesson 3: Objectives</b></p> <p>By the end of the training, the learners will be able to:</p> <ul style="list-style-type: none"> <li>• Use a variety of questions to determine customer needs without escalation to customer service in 80% of the calls</li> </ul> </div>



## Topics

This lesson includes the following topics:

	<b>Topic</b>	<b>Page</b>
1	Introduction	21
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## Why is Important



### Introduction

Before introducing the three question types, you need to be aware of how important it is to ask the customers appropriate questions.

**Discuss:** with the learners to see whether they realize that asking appropriate questions is important and why.

**Go over:** some real-life examples to explain why it is important to ask appropriate questions.



### Asking Questions - Why

There are many good reasons for customer service reps to ask questions before trying to offer a recommendation or a solution to a customer. Three most important ones are:

- To get information from the customer.
- To express interest in the customer.
- To help customers help themselves.

### Lesson 3: Asking Questions - Why

- Three most important reasons to ask questions:
  - To get information from the customer
  - To express our interest in the customer
  - To help customers help themselves

## Clarifying Questions

**Go over:** the concept



### Introduction

Now that you have a better understanding of the importance of asking questions, you will learn about one of the first of three types of questions will be introduced to from now on—clarifying questions.

**Explain:** what clarifying questions are and the tips of asking clarifying questions. Bring the real life examples as needed for example: a customer complains that she never received her order. After listening to her, you could begin your summarizing statement by saying something like: “I can tell you’re really upset, let me see if I can get this right “or “You are most concerned about...” or “I can tell you are really concerned about this. Let me see if I can repeat to you your main concerns so we can start to think about what to do in this situation.”



### Clarifying Questions

Clarifying questions are queries that examine facts to shed light on a problem.

The reason and tips of clarifying questions are:

- Don’t make assumptions
- Have a bias towards clarity
- Use more words to explain
- Ask close-ended questions to gain specific information

### Lesson 3: Asking Questions - Types

#### Clarifying Questions

- Don’t make assumption
- Have a bias towards clarity
- Use more words to explain
- Ask close-ended questions to gain the specific information



**Discuss:** when to use such questions and how. You can refer back to the example you just gave.

**Points out:** that sometimes closed-ended questions could cause a person to feel pressured to answer a certain way. For example, a leading questions might be: “Don’t you think the dress is cute?” Tags such as “isn’t it?”, “don’t you?” could suggest that person you’re talking to agree with you.



## Lesson 3: Asking Questions - Types

### Clarifying Questions

- Example 1 Would you like...?
- Example 2 Do you think...?

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## Open-ended Questions

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**Review:** the clarifying questions concept and discuss its advantages and disadvantages.



### Introduction

In the previous topic, you learned what clarifying questions are and tips for asking clarifying questions. This topic focuses on open-ended questions.

**Explain:** what open-ended questions are and the purpose of these kinds of questions. Bring in real life examples as needed.



### Open-ended Questions

An open-ended question is a query that is designed to elicit a longer, meaningful reply in order to gather more information.

**Emphasize:** When asking open-ended questions, try to pause, think and reflect. Answers will be personal feelings, opinions, or ideas about a subject. The control of the conversation switches over to the person being asked the questions.

The reason and tips of open-ended questions are:

- Elicit a longer response
- 
- Are best to pick up important details that may help you figure out an effective solution for this customer.
- Help build rapport. Permission to talk is highly valued by people
- Help the customer have more confidence and satisfaction with representative and the eventual outcome
- Begin with what, why, how and tell me about...

### Lesson 3: Asking Questions - Types

#### Open-ended Questions

- Elicit a longer response
- Pick up important details
- Help build rapport. Permission to talk is highly valued by people
- Increase the customers' satisfaction
- Begin with what, why, how and tell me about...

**Discuss:** when to use such questions and how.

**Compare:** the usage of clarifying questions and open-ended questions. For example, if you're struggling to get the person to open up with broad open-ended questions try narrowing the questions first and then make them broader after getting them into the conversation.



## Lesson 3: Asking Questions - Types

### Open-ended Questions

- Example 1 What are...?
- Example 2 Why is that...?
- Example 3 How do you...?

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## Clearinghouse Questions

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**Review:** the clarifying questions and open-ended questions concept with the discussion of its advantages and disadvantages.



### Introduction

In the last topic, you learned what open-ended questions are and how to use them. This topic concentrates on clearinghouse questions.

**Explain:** what clearinghouse questions are and the purpose of these kinds of questions. Bring in real life examples as needed. For example: at the end of the class, the instructor allowed students to ask any questions that wasn't covered in that class period.



### Clearinghouse Questions

Clearinghouse questions are a type of open-ended query used as a follow up for other questions when you are unsure you have all of the information you need.

The reason and tips for asking clearinghouse questions are:

- Provide another opportunity to hear the customer's needs
- Listen for what is not said before

Usually clearinghouse questions are open-ended questions as follow ups for other questions. For example, asking an open-ended question that refers to what has just been said or is related to what just been said.

### Lesson 3: Asking Questions - Types

#### Clearinghouse Questions

- Provide another opportunity to hear the customer's needs
- Listen for what is not said before

**Discuss:** when to use such questions and how



### Lesson 3: Asking Questions - Types

#### Clearinghouse Questions

- Example 1 What else...?
- Example 2 Here is what we have, anything else...?

**Ask:** students to fill out the table on the right to compare three types of questions to see their purposes and usages.

### Lesson 3: Asking Questions - Types

	Clarifying Questions	Open-ended Questions	Clearinghouse Questions
The questions structure			
When to use			
Purpose of the questions			

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## Review and Summary

**Review:** of the lesson



### Introduction

Summarize important points and allow time for questions.

**Prepare:** the class exercises to help the participants utilize the skills in the real life situation. (see Appendix D and E)



### Lesson 3: Asking Questions – Exercises

- Identify the questions types and analyze how they help to build the rapport and gain the information you need. (See Appendix D)

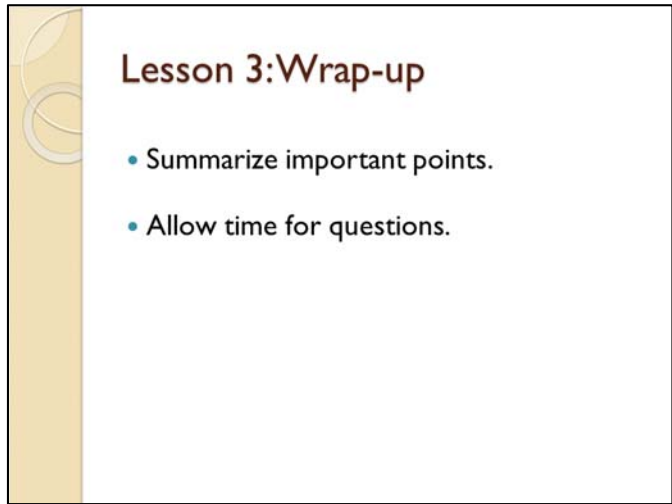
**Conduct:** class activities.

**Conduct:** Role-play Scenarios activities. (See Appendix E)

### Lesson 3: Asking Questions - Exercises

- Role-play Scenarios. (See Appendix E)

**Summarize:** the lesson content and allow time for questions.

A presentation slide with a yellow vertical bar on the left side containing a circular graphic. The main content area is white with a black border. The title "Lesson 3: Wrap-up" is in a dark brown font. Below the title are two bullet points in a blue font.

**Lesson 3: Wrap-up**

- Summarize important points.
- Allow time for questions.

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## Appendix A: Pretest

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1. Explain the process for preparing to answer a call and then connecting to a call.
2. Briefly describe how you greet a customer when you answer the phone.
3. What's one method you can use to investigate the nature of a customer's call?
4. A customer calls wanting to buy a lamp she saw in a friend's catalog. Write down three clarifying questions you can ask to find more information so you can properly help her.
5. A customer calls wanting to know more about a blouse she saw in the catalog, what are three kinds of details you can provide?
6. A customer calls because she was expecting delivery of her package yesterday. Write down three open-ended questions you can ask to find more information so you can properly help her?
7. A customer calls with an issue regarding a sweater size. She has explained that she is 5'10" with an average body type. She is concerned about the sweater not fitting her properly. What is one follow-up question you can ask her to find out more information so you can properly help her?



## Appendix B: Agenda Outline / Timeline

TIME	TOPIC
<b>30 minutes</b>	<b>Course Introduction</b>
	Administrative Details
	Introduce facilitators
	Introduce customer service supervisors and TOs
	Purpose of Training
	Pre-requisites
	Course Objectives
	Organization of Training
	Agenda
	Question & Answer
<b>60 minutes</b>	<b>Lesson 1: PJE Customer Service Protocols</b>
	Introduction
	Discuss supervisor annual review and revision process
	Review of customer service protocols
	Trainings upon hire and annually
	Communicate concerns and questions to customer service supervisors: Chain-of-command, Procedure, Reporting options, Reporting unethical behavior
	Practice/role-play
	Review and summary
	Assessment
<b>15 Minutes</b>	<b>Break</b>
<b>120 minutes</b>	<b>Lesson 2: General Customer Service Procedures</b>
	Introduction
	Answering the phone
	Connecting to the call
	Greeting
	Investigating the nature of the call: Placing a new order, Changing an existing order, Tracking an order, Returns Technical difficulties, Other customer service concerns
	Retrieving customer information
	Confirming customer information

	Updating customer information
	Entering new customer information
	Interpersonal communication skills: Voice—tone, pitch, volume, quality; Pronunciation; Responding to customer questions; Responding to customer concerns
	Activity: Evaluating sample calls
<b>30 Minutes</b>	<b>Lunch</b>
	Asking questions
	Clarifying questions
	Open-ended questions
	Clearinghouse questions
	Elevating calls to supervisors
	Attempt to resolve customer questions and complaints
	Follow PJE customer service protocols
	Elevate customer calls to a supervisor per customer request
	Offer to elevate calls as appropriate
	Maintaining customer records
	Practice/role-play
	Review and summary
	Assessment
<b>15 Minutes</b>	<b>Break</b>
<b>105 minutes</b>	<b>Lesson 3: Customer Orders and Returns</b>
	Introduction
	Catalog Launch
	Review of key new products
	Review of discontinued products
	Product guide database
	Using the product guide database
	Looking up products in the guide
	Communicating product details
	Ask customers clearinghouse questions
	Offer options for further assistance
	Placing orders
	Looking up items in the product guide
	Entering orders
	Assisting customers with submitting online order

	Tracking orders
	Looking up orders
	Communicating location and delivery information
	Returns
	Answer calls
	Enter return information
	Communicate return process to customers
	Quality control data entry
	Supervisors and TOs follow-up
	Elevating calls to supervisors
	Attempt to resolve customer questions and complaints
	Follow PJE customer service protocols
	Elevate customer calls to a supervisor per customer request
	Offer to elevate calls as appropriate
	Practice/role-play
	Review and summary
	Assessment
	Telephone Operators dismissed
<b>15 Minutes</b>	<b>Break</b>
<b>90 minutes</b>	<b>Lesson 4: Train-the-Trainer for Customer Service Supervisors</b>
	Introduction
	Review of lessons 1-4
	Discussion
	Review and revision of customer service protocols
	Responding to customer calls that have been elevated by TO's
	Answering the phone
	Resolving customer questions and complaints
	Following-up with TOs
	Supervisory skills
	Supervising TOs
	Addressing behavioral issues
	Addressing policy violations
	Conflict mediation
	Conducting performance reviews
	Rewarding excellent service

	Leading by example
	Facilitating TO training
	PJE customer service protocols
	New TO training
	Annual TO training
	Role-play scenarios
	Review and Summary
	Assessment

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## Appendix C: Connecting to a Call Job Aid

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PJ Enterprises uses a system that routes calls automatically to your station. In order for this system to work properly, you must follow these steps:

1. Make sure that your headset is on and working properly.



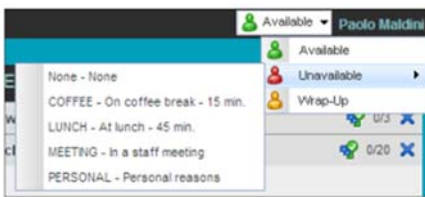
2. Sign in to the system software with your user name and password.




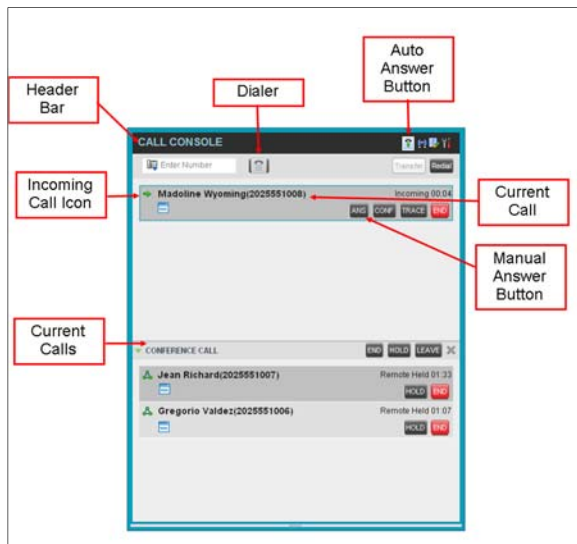
Note: Once you log in, you will automatically be taken to the Call Center Interface screen.




3. In the Logo pane, click the drop down menu in the Logged User area and set the ACD status to **Available**.




4. Click the Auto Answer icon  in the Header Bar of the Call Console pane.



The blue square inside the icon  indicates that the **Auto Answer** is on and you are ready to receive calls.

When you receive a call, the **Incoming Call** icon  will flash.

5. To connect to the incoming call, press the **Answer** button .

## Appendix D: Exercises for Lesson 3D

Identify the questions types and analyze how they help to build the rapport and gain the information you need. The handout with questions needs to be distributed to the participants. It could be either individual or group work.

<p><b>Facilitator Notes:</b> There are no absolute right or wrong answers. The students are required to give the explanation to their answer. More questions can be added by facilitators. The notes for the each question are for the reference.</p>	<p><b>Questions:</b></p>
<p>Starting with this question, TO shows the respect to the customers and gains the trust from them. It is a clarifying question which doesn't mean to request the fact, but build the relationship.</p>	<p>Do you mind if I ask you some questions so we can figure out what has happened?</p>
<p>This is a clearinghouse question. It could be asked after answering the customer's questions or concerns. This closed-ended question could result in a simple "no" answer. If you add "may I help you with anything else such as...?" it could be a good question to start introducing new product and even sell it.</p>	<p>May I help you with anything else?</p>
<p>This is an open-end question to give the customer the opportunity to explain the situation and their needs. It will be better to add the empathy before this questions e.g. "I can tell that this situation is very upsetting to you." In this way, the customer will be more willing to tell you the details.</p>	<p>How did this happen?</p>
<p>This is a clarifying questions and also could be an open-ended question. If the customer couldn't tell you enough information you need, you can add open-ended probing question for clarity or completeness.</p>	<p>Could you describe the products?</p>
<p>This is an open-ended question to allow the customers share their feelings, opinions and ideas. You can ask clarifying questions to gain the accurate information, but try not to offer the suggestion too soon.</p>	<p>What do you think?</p>
<p><b>More questions can be added into this exercise if time permitted.</b></p>	

## Appendix E: Exercises for Lesson 3D

Facilitator Notes	Scenarios
<p><b>Notes for the facilitators:</b> Role-play Scenario exercises. This exercise can be in pairs or small group. If it's pairs, the two participants will role-play the scenario and then allow the whole class to discuss and analyze their performance. If it's the small group, two members in the group do the role-play first and then other members could be the evaluators to discuss and analyze the performance till the group reaches a consensus for the best performance.</p> <p>Three kinds of questions need to be used in all three scenarios.</p> <p>Encourage the participants come up with their own answer and judgement rather than giving them answers directly.</p> <p>Each group can choose one scenario to work on it.</p> <p>Facilitators can use different scenarios based on your knowledge and experience.</p>	<p>Scenario 1:</p> <ul style="list-style-type: none"> <li>• A customer informs you that the package she received wasn't sealed properly and that she only received one earring of a pair. What kind of questions you can use to resolve this complaint?</li> <li>• Describe how you would end the call with the above customer.</li> </ul>
	<p>Scenario 2:</p> <p>A woman phones in wanting to order a belt that she saw in the catalog. What questions you can use to locate the belt in the database? Once you located the belt, how would describe it to the customer and help her make the order?</p>
	<p>Scenario 3:</p> <p>A week later, the woman in the above scenario calls again wanting to return the belt. What questions you can use to help her return it?</p>



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## Appendix F: Post Test

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A post test similar to the final assessment proposed in the design document will be added later.

### Customer Service Training for Operators

1. You have a concern for your supervisor, what are your reporting options?
2. A customer calls with a concern about the metal used in a pair of earrings. She thinks it is the cause of her ear infection. What guidelines can you use to resolve the issue (choose all that apply)?
  - a. www
  - b. Xxx
  - c. Yyy
  - d. zzz
3. Describe the process for escalating a call to your supervisor.
4. Which of the five customer issues would warrant escalation to your supervisor (select all that apply)?
  - a. A customer calls wanting eight clown figurines to give as Christmas presents and wants you to give her a volume discount.
  - b. A customer hasn't received an item she ordered six days ago.
  - c. A customer wants to know if a rug she purchased can be put into the washer.
  - d. The customer who purchased eight clown figurines wants to know the shipping cost.
  - e. A customer wants to know if a scarf she sees in the catalog is real silk.
5. A customer informs you that the package she received wasn't sealed properly and that she only received one earring of a pair. What are two common guidelines you can use to resolve this complaint?
6. Describe how you would end the call with the customer in question 5.
7. Using the approved guidelines, describe how you might up sell decorations for someone who ordered a wreath.
8. What are two items could you up sell someone who wants to purchase a set of earrings?

### Customer Service Training for Supervisors

1. Describe the process for answering the phone and greeting a customer with proper etiquette.

2. An operator comes to you because she is concerned about another operator not clocking out so she can collect overtime. Describe the guidelines you can take to handle this situation.
3. An operator has escalated a call at the request of a customer who has a complaint about the operator not honoring a coupon code she found online. What guidelines can you use to resolve the issue (choose all that apply)?
  - a. www
  - b. Xxx
  - c. Yyy
  - d. zzz
4. Describe how you might end a call with the customer in question 3?
5. An operator has escalated a call at the request of a customer who has asked if PJ Enterprises could replace a spring clasp with a large barrel clasp on a necklace. She claims the necklace is too heavy for the smaller clasp and it keeps breaking. What guidelines can you use to resolve the issue (choose all that apply)?
  - a. www
  - b. Xxx
  - c. Yyy
  - d. zzz
6. Using the approved guidelines, describe how you might up sell earrings to the lady in question 4.
7. What steps would you take to address a conflict between two operators who are upset about who should go on break?
8. How would you address an issue with an operator not using proper etiquette to end a call with a customer?