

Soft Skills Module 13

Customer Service Standards



Soft Skills Module 13

Customer Service Standards

Summary	
<p>Goals:</p> <p>Develop and cultivate knowledge of professionalism in meeting customer needs and expectations.</p> <p>SMART Objectives: <i>Specific, Measurable, Achievable, Realistic, and Time-sensitive</i></p> <p>By the end of this module, students should be able to:</p> <p>SS13.1 Know the meaning and fundamentals of poor, good, and great customer service.</p> <p>SS13.2 Be familiar with the skills involved in developing business/professional relationships with customers.</p> <p>SS13.3 Understand and clarify expectations with customers/prospective customers leading to effective decision making.</p> <p>SS13.4 Describe and/or exhibit suitable personal image and presentation.</p>	<p>Instructor:</p> <hr/> <p>Delivery Method(s):</p> <p>Discussion Video/You-Tube Role play</p> <hr/> <p>Length:</p> <p>Four Topics Total length: 5 hours</p> <hr/> <p>Any Applicable Business and/or Soft Skills?</p> <p>Business Skills:</p> <ul style="list-style-type: none"> • Professionalism • Marketing <p>Soft Skills</p> <ul style="list-style-type: none"> • Should come after Communication Module <hr/> <p>Corresponding NLS Lesson #</p>
<p>Take Away Message(s): Students will be able to develop and cultivate professional relationships, make effective decisions and present as a competent, capable expert braille transcriber when they are knowledgeable about customer service needs and expectations.</p>	

Instructor Preparation

Title of Module: Customer Service Standards

Instructor:

This module is a critical one, in that it brings two functional elements of business development – customer service and personal image. Businesses lacking in one or both have a very low chance of survival.

Instructors should not assume that good customer service is an understood concept; even if it can be described expertly, it is still frequently very difficult to put into practice.

Good customer service combines a number of skills that are not regularly practiced in the prison environment due to the nature of the institutionalization. Many of these skills have been covered in the prior soft skills modules as well as in the braille transcribing curriculum.

All too often, the background and experience of students has not presented adequate opportunities to be exposed to, learn, understand and/or employ good customer service skills.

Good customer service is built on attitude and relationships. Good customer service anticipates customer expectations/needs and strives to meet those using wise and well thought-out decision making skills. Good Customer services means exhibiting suitable personal image and presentation skills.

Agenda – topics to be covered in the module and length of each item

<i>Topic: Customer Service</i>	<i>Time Allotted: 5 hours</i>
A. Customer Service – What Is It and What Does It Look Like?	<i>(1.5 hours)</i>
B. Developing Business/Professional Relationships	<i>(1.5 hours)</i>
C. Customer Expectations and Decision Making	<i>(1 hour)</i>
D. Personal Image and Presentation	<i>(1 hour)</i>

Materials & Supplies – items needed in order to carry out the agenda and classroom activities

1. Handouts: Customer Service Personal Opinion Survey (13.A.1), Building Professional Customer Service Relationships My Way (13.B.1), Skills that Promote Business and Professional Relationships with Customers (13.B.2), APIE Strategy for Building

Professional Relationships (13.B.3), Mind Mapping (13.B.4), Practicing Introductions and Small Talk (13.B.5), Observation Guide for Speaking Clearly (13.B.6), Anticipating Customer Expectations (13.C.1), Personal Presentation – Customer Service Communication (13.D.1), Exhibiting a Suitable Personal Presentation and Image (13.D.2), The Do Not Do's and the Do's (13.D.3)

2. PowerPoints: – Customer Service PowerPoint (13.A.2), Developing Business Relationships PowerPoint (13.B.7)
3. Access to Module 5 - Communication - Effective Communication Listening, Speaking, Writing, Interpreting (Module 5)

Classroom Preparation – *steps to follow when setting up the learning environment*

1. PowerPoint presentation set-up or copies of PowerPoint and document reader
2. Flip chart/pad with markers for participants; board/markers for instructor
3. Students will need their reflection journals
4. Students configured to facilitate group work and discussion
5. Anticipating Customer Expectations (13.C.1) enlarged copy for tallying or a document reader
6. Phonebooks, pre-printed lists, newspapers, resource lists for mind mapping activity

Curriculum Content

A. Customer Service – What Is It and What Does It Look Like? (1.5 hours)

Objective SS13.1: Know the meaning and fundamentals of poor, good, and great customer service.

PREINSTRUCTIONAL ACTIVITIES

Have the students work through the **Customer Service Personal Opinion Survey (13.A.1)**.

CONTENT PRESENTATION AND LEARNER PARTICIPATION

Show the **Customer Service PowerPoint (13.A.2)** and have students complete the embedded activities.

- Slide 2** Customer Service is not a department or area in a micro-enterprise. It is an attitude!
- In your opinion, what does this mean in the business of braille transcribing?
 - Write two statements that explain this statement...

- Slide 3** Lead a discussion about this aspect of today's marketplace and the delivery of good customer service skills.

- Slide 4** Review each of the operational definitions and have a brief discussion using the questions on the left of the slide.
- How would you define Customer Service?
 - Which of these do you agree with?
 - Are there any that you disagree with?

- Slide 5** Review the seven good customer service skills.
- Put seven pieces of chart paper around the room, each having one of the skills as a heading
 - Have students divide into 7 groups
 - Assign each group one skill area from the slide
 - Have each group think about being a micro-enterprise, expert braille transcriber and as such identify one scenario the depicts poor customer service and one scenario that demonstrates good customer service
 - Groups should put major points for each scenario on chart paper and then present their thoughts to the whole group

- Slide 7-8** Talk about taglines.

- Have students write their own tagline depicting good customer service

Reflection and Journal

Have students reflect and journal about their thoughts regarding customer service strategies and approaches when they are set up as a micro-enterprise. What will be important to them; how will they define their customer service strategies?

B. Developing Business/Professional Relationships (1.5 hours)

Objective SS13.2: Be familiar with the skills involved in developing business/professional relationships with customers.

CONTENT PRESENTATION AND LEARNER PARTICIPATION

Begin the **Developing Business Relationships PowerPoint (13.B.7)**. Students should follow along slides 2-8 using **Building Professional Customer Service Relationships My Way (13.B.1)** worksheet and write their responses. Remind them that their responses should mirror their thinking and belief systems.

Distribute the **Skills that Promote Business and Professional Relationships with Customers (13.B.2)** worksheet to students and discuss the concepts.

Next show slide 9 of the Developing Business Relationships PowerPoint. Students should follow along with the **APIE Strategy for Building Professional Relationships (13.B.3)** handout. Explain to students each step of the strategy:

Assess - Connections I should make... (Whom do they know? Whom do you want as customer and what you want to say and how should I say it?)

Plan - How will I approach them; what will my plan look like? (Plan your strategy including how you might evaluate your plan during and after implementation.)

Implement - What will my implementation strategy be; what is my timeline for implementing my strategy? (Evaluate your success using the criteria set when planning; make adjustments as needed.)

Evaluate - What measurements will I use to evaluate whether my relationship-building plan is working? (Lead back to the evaluation criteria set during planning.)

Show slides 10 and 11. Help students create a Relationship Networking Mind Map of places they want or think they want to make connections to build relationships. Using **Mind Mapping – Business/Organizations Relationship-Building Identification (13.B.4)** as a template, lead students through the process of relationship development using the brainstorming mind mapping approach.

Provide phone books, pre-printed lists and other resources available for reference/research

Show slide 12 of the PowerPoint. Guide the students in a Think Aloud activity (see notes at end of this topic) – modeling how to think about this scenario:

If you do not have a connection or name at a place/resource, what would you do/say to get the name and resource?

Next, students should review their **Building Professional Customer Service Relationships My Way (13.B.1)** worksheet; they may also want to review the module and lessons on Communication - **Effective Communication Listening, Speaking, Writing, and Interpreting** (Module 5).

Have students review the two scenarios presented in **Practicing Introductions and Small Talk (13.B.5)** and consider how they would introduce themselves and what kind of small talk they would carry out. Students should write a few notes about what they might say in preparation for practice and can use the **Observation Guide for Speaking Clearly (13.B.6)** as a guide for self-evaluation.

Close the activity with students participating in role play of the two scenarios to practice their introductions and small talk. During the role-play the observing students can give feedback using the **Observation Guide for Speaking Clearly (13.B.6)**.

When giving feedback, students should give two to three positive comments and then one or two points for improvement.

Another activity that may be useful to students is the Think Aloud Design. The Think Aloud Design allows the instructor to explicitly model how a student might think about achieving success given the scenario posed: If you do not have a name or connection at a place/resource, what would you do/say to get the name and resource?

While the process is fairly simple, instructors are advised to practice a few times prior to using this method with students. In this scenario, the instructor should begin by telling students what a think aloud is (a moment or two of how I might think about the scenario and how to approach) and that they should just listen, not make suggestions, comments, or in any way participate. The instructor then begins, stating aloud the thoughts and decision-making processes that are typically internal.

"Hmmm, I don't have a name or contact position for this resource that might have some work for me; wonder how I can get that. Let's see... I could go on the internet and look for the company but I'm not sure I would get the name and phone number of the right person. I could look in the phone book, but I don't even know where my phone book is at this moment. I could call 411 (information) and get the main number for the company – I think I'll do that. Okay – I've got the number; dialing; person answers... Good afternoon, my name is Ms. Instructor and I am a braille transcriber. Could you please tell me the name of the person I would contact in your company who contracts for this type of work? Oh thank you. Before you connect me with Mr. Thomas, can you give me his direct number? Thanks – now would you mind connecting me?"

This explicit modeling will help students make accurate predictions, visualize, link information to things they already know, and improve their understanding of the process. Occasional explicit modeling will benefit all the students as they strive to be professional when approaching a customer with whom they are not familiar.

After instructor modeling, students should practice with partners.

C. Customer Expectations and Decision Making (1 hour)

Objective SS13.3: Understand and clarify expectations with customers/prospective customers leading to effective decision making.

PREINSTRUCTIONAL ACTIVITIES

Begin the lesson by writing the following statement on the board:

"Customer complaints are the schoolbooks from which we learn."

Ask the students to discuss what this metaphor means when owning a microenterprise.

CONTENT PRESENTATION AND LEARNER PARTICIPATION

Explain that understanding customer expectations is central to customer services; the role of a braille transcriber is to work and communicate with customers in a positive manner and to satisfy customer expectations to the best of their ability, making appropriate and conscientious decisions along the way.

Divide students into groups of four or five and ask them to brainstorm some general ways they can satisfy customer expectations...

Have them write their responses on the flipchart paper, post on walls of the classroom.

Here are some prompts to help stimulate the brainstorming...

Do customers have needs?

What if you gave more than a customer expected? What would happen?

How could you surprise your customers by going beyond what they expect?

Have students independently work through the worksheet **Anticipating Customer Expectations (13.C.1)**. After all students have completed, tally the selections using an enlarged copy or a paper copy on a document reader. Next, students should discuss the highest needs and expectations selected, giving a rationale for their selections.

D. Personal Image and Presentation (1 hour)

Objective: SS13.4: Describe and/or exhibit suitable personal image and presentation.

CONTENT PRESENTATION AND LEARNER PARTICIPATION

This lesson is designed to help students think about themselves as microenterprise contractors and as such, assess their personal image and presentation factors. In order to create a strong relationship and trust level with the customer, students will need to present themselves as competent, capable individuals who are expert braille transcribers.

In the beginning, potential customers make decisions based on appearance, nonverbal behaviors verbal skills, and personality. The quality of the work, timeliness and other customer service elements come as secondary.

Have students complete the **Personal Presentation – Customer Service Communication (13.D.1)** worksheet; then compare their responses to another student's to see differences of approach.

Next, provide students with information about appropriate dress and hygiene as they become microenterprise business people. Have students focus first on what they know, their opinions, by completing the two sections using the **Exhibiting a Suitable Personal Presentation and Image (13.D.2)** handout:

Make a list of things you should not do/wear when dressing and preparing to meet a customer or prospective customer...

Make a list of things you should do/wear when dressing and preparing to meet a customer or prospective customer...

Then have students look at the lists on **The Do Not Do's and the Do's (13.D.3)** handout and compare them with their lists. Ask students about differences of opinion and help clarify where needed.

Diversity in the workplace

What is meant by the term "diversity" in the 21st Century? The following definition provides a conceptual and concrete definition.

"Diversity refers to human qualities that are different from our own and those of groups to which we belong; but that are manifested in other individuals and groups. Dimensions of diversity include but are not limited to: age, ethnicity, gender, physical abilities / qualities, race, sexual orientation, educational background, geographic location, income, marital status, military experience, parental status, religious beliefs, work experience, and job classification."

Foothill-De Anza Community College District
The Human Resources & Equal Opportunity Office

As an independent braille transcriber, it is important to take some time to think about diversity as a concept that has a focus, broader than race and gender. From the perspective of the contractor – the microenterprise owner – respecting diversity means owning a business that values and recognizes the distinctive contributions of people with many types of differences and working to create relationships that foster such.

Retrieved August 2011. <http://hr.fhda.edu/diversity/>

Soft Skills Module 13

Customer Service Standards Handouts

Customer Service Personal Opinion Survey (13.A.1)

Read each statement and determine whether you agree, disagree or are neutral.
Be prepared to defend your answers.

Statements	Agree	Disagree	Neutral
1. Long term customers are easier to satisfy than new.			
2. The customer is a single thing or entity; easy to target.			
3. The customer is your "boss."			
4. Treat the customer right & he/she will always come back.			
5. Right or wrong, the customer is always right.			
6. The customer is always wrong.			
7. The customer should be treated like you would treat a member of your family.			
8. If you learn how to "put up with customers," business can be great!			
9. A happy customer will tell 3 friends; an unhappy customer will tell the whole world.			
10. Some people are just naturally good at customer service.			
11. Treat your customers as you would want to be treated.			
12. Good customer service is just plain common sense.			
13. People deliver the best customer service when they like what they do.			
14. The customer perceives "good customer service" in his or her own terms.			
15. Put yourself in your customer's place should be the golden rule for every business person.			
16. Customers always expect perfection.			
17. Comment cards and surveys measure customer service accurately.			
18. The term "good customer service" means the same thing to everyone.			
19. "Good customer service" is not good enough.			
20. If you discover how to "put up with customers," business can be great.			
21. The customer comes first.			
22. Customers do not care about great service; they just want the lowest price possible.			
23. People buy from those they like; not whether they get good customer service.			
24. Always give customers more than they expected.			
25. Customers will not complain; they just will not become repeat customers.			

13.A.1



Customer Service Personal Opinion Survey (13.A.1 cont.)

What other phrases have you heard? List them and choose whether you agree, disagree or are neutral. Again, be prepared to defend your answers.

Statements	Agree	Disagree	Neutral

13.A.1

Building Professional Customer Service Relationships My Way (13.B.1)

What do you pack to pursue a professional relationship and what do you leave behind?



What does it take to create productive professional working relationships?



13.B.1

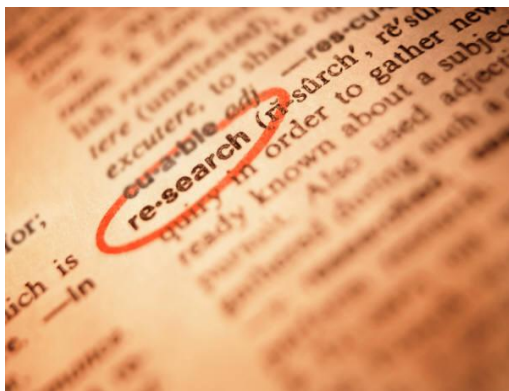
What does it mean to understand the culture of the customer you are serving?



What are the critical features of a well-developed relationship?



How do you find out about the business customer?



13.B.1

What are your best attributes that you can use to create solid relationships?



What ***Core Principles*** do you want to establish as anchors to building your relationships and customer service strategy?



13.B.1

Soft Skills Module 13-15

Skills that Promote Business and Professional Relationships with Customers (13.B.2)

- Know the customer business vision for the future.
- Understand the customer mission and purpose in life (or business).
- Recognize who your contacts are.
- Comprehend the customer management and delivery style.
- Know how to engage the customer; understand the etiquettes of small talk.
- Ensure your ***Core Principles*** include Equity, Transparency, and Mutual Benefit.
- Relationship building can be complex; be true to your ethics and values.
- Networking is a critical component.
- Keep relationships solid.
- Keep your mission and intent at the forefront of everything you do.

13.B.2

Soft Skills Module 13-16



Strategy for Building Professional Relationships – APIE (13.B.3)

Assess

Connections I should make... Who do you know?

Plan

How will I approach them; what will my plan look like?

Implement

What will my implementation strategy be; what is my timeline?

Evaluate

What measurements will I use to evaluate whether my relationship-building plan is working?

13.B.3

Mind Mapping – Business/Organizations Relationship-Building Identification (13.B.4)

Create a Mind Map of those places you want or think you want to make connections with to build relationships.

Use phone books and other resources available for reference/research.

The image shows a blank mind map template within a blue-bordered frame. At the center is a square box. From this central box, four lines extend outwards to four smaller rounded rectangular boxes. Each of these four boxes then branches out into two more rounded rectangular boxes, creating a total of 16 peripheral boxes. The layout is symmetrical and hierarchical. At the bottom of the frame, there are two rectangular input fields: one on the left labeled "Subject:" and one on the right labeled "Date:".

13.B.4

Practicing Introductions and Small Talk (13.B.5)

Think About:

If you do not have a connection or name at a place/resource, what would you say to get the name and resource?

Review your module and lessons on Communication - **E**ffective Communication
Listening, Speaking, Writing, and Interpreting.

Introductions & Small Talk

Scenario: Think about yourself as a braille transcriber looking for new customers; how would you introduce yourself and what small talk would you engage in on the first meeting?

Scenario: You are meeting with a returning customer who was only moderately pleased about the work done last time. How would you introduce yourself and what small talk would you engage in with this customer who has already used your services? Write a few notes about what you might say and in what order; use the Observation Guide for Speaking Clearly as a guide for self-evaluation.

Write a few notes about what you might say and in what order; use the Observation Guide for Speaking Clearly as a guide for self-evaluation.

13.B.5

Observation Guide for Speaking Clearly (13.B.6)

Message Focus	Conversation Stages
Information understandable	Made introductions
Stated well	Pre-meeting small talk
Objective	Strong core conversation
Clear "Take Away"	Wrapped-up summarized
Got customer attention	Exited with small talk
Focused on customer interests	
Understood customer need and importance	
Used visual (descriptive) language	
Used analogies	
Asked for feedback	
Made adjustments based on feedback	
Used appropriate language and words	
Pronounced words correctly	
Grammar was correct	
Did not use one or two words too many times	
Stayed away from the popular phrases	
Avoided slang and swearing	
Used person-first language (a person who is blind)	
Avoided phrases and slang that targeted a culture or group	
No bad jokes	
Non-verbal Communication	
Smiling	Laughing
Gestures good	Handshake style
Standing good distance to customer	Being stand-offish
Hair	Face
The way you look	Body
Clothing	Posture
Sighing	Frowning
Mannerisms	Crying
Notebook/folder	Portfolio
Voice tone	
<ul style="list-style-type: none"> • Pitch – highness or lowness • Volume – loudness or softness • Tone – emphasis and inflection • Rate – speed fast to slow 	<ul style="list-style-type: none"> • Smooth to shaky • Enunciation – diction/correctness
13.B.6	



Anticipating Customer Expectations (13.C.1)

Underline the words you think reflect the needs and expectations of the customers you will have when you are in business as a braille transcriber. As you select, think about customer skills and customer relationship building. (Clue – think about what you would want if you were purchasing your services.)

A starter sentence to help you might be: Customers needing a contracted braille transcriber will need/will have the expectation that I am...

accurate	convenient	helpful	patient	sensible
adaptable	cooperative	honest	personal	sensitive
alert	cost effective	imaginative	pleasant	serious
ambitious	creative	independent	poised	sincere
available	customized	industrious	polite	sociable
broad-minded	dependable	innovative	positive	stable
businesslike	determined	intelligent	practical	steady
calm	eager	kind	precise	tactful
capable	easygoing	knowledgeable	professional	teachable
careful	easy to access	likeable	purposeful	thorough
cautious	efficient	logical	quick	thoughtful
cheerful	energetic	loyal	quiet	timely
clean	experienced	mature	realistic	tolerant
clear-thinking	fair-minded	obliging	relaxed	trusting
competent	fast	open-minded	reliable	trustworthy
competitive	firm	optimistic	resourceful	understanding
confident	flexible	organized	respectful	versatile
confidential	friendly	original	responsible	warm
conscientious	good-natured	outgoing	self-confident	wise
considerate	healthy	outspoken	self-controlled	13.C.1

Personal Presentation – Customer Service Communication (13.D.1)

On the left are poor responses to customer needs and expectations. Write what might be a better or more positive response on the right side.

Poor Customer Service Statement

Good Customer Service Statement

I did what you said you wanted...	
That appointment is too early for me...	
Braille transcribers don't do that...	
I'm really busy right now...	
Can you call back tomorrow...	
Those mistakes you found; those are not my fault...	
I don't know...	
You want it by the end of the week (chuckle, chuckle)...	
Calm down...	
I'll be off my cell in a minute...	

13.D.1



Exhibiting a Suitable Personal Presentation and Image (13.D.2)

When you are getting ready to meet a customer or potential customer, the image you present is very important even before you have a chance to say a word or shake a hand. That image is the first thing your customers or potential customers are going to notice about you.

What is Your Opinion?

To help organize your attire and decide what reasonable dress/preparation in most situations might be, identify you think would be acceptable and unacceptable.

Make a list of things you should not do/wear when dressing and preparing to meet a customer or prospective customer...

1.	9.
2.	10.
3.	11.
4.	12.
5.	13.
6.	14.
7.	15.
8.	16.

Make a list of things you should do/wear when dressing and preparing to meet a customer or prospective customer...

1.	9.
2.	10.
3.	11.
4.	12.
5.	13.
6.	14.
7.	15.
8.	16.

Tip: If you have questions about what you should wear, check out similar environments and observe what people are wearing. You can also visit the customer workplace to see what the people coming in and out of the building are wearing.

Look at the lists on the next pages and compare them with your lists. What is different? Are there things you agree or disagree with on the provided lists? Why? 13.D.2



The Do Not Do's (13.D.3)

<i>Things Not To Do for Women/Men...</i>	<i>agree</i>	<i>disagree</i>
Wear flip flops or sneakers		
Wear shorts		
Wear jeans		
Wear pants that are too low, rise up or are too tight		
Wear social/fun clothes for work-related functions		
Wear perfume or cologne (people may have sensitivities/allergies)		
Wear an outfit that is trendy		
Chew gum		
Use your cell phone or take a call while waiting for your customer		
Take a call during your appointment with your customer		
Listen to your iPod while waiting for your customer		
Arrive with coffee, soda, or food to your appointment		
<i>Things Not To Do for Women Only...</i>		
Have underwear (bras, bra straps, briefs, boxers, etc.) that is visible; even bra straps that match your top		
Wear skirts that are too short		
Wear blouses too low cut that show cleavage or too short that show belly		
Wear a thong that shows above your pants		
Wear dangling earrings or arms full of bracelets; no jewelry is better than cheap jewelry		
<i>Things Not To Do for Men Only...</i>		
Wear shirts that are too tight or pull at the buttons when sitting		
Wear pants that are too tight or too big		
Wear t-shirts		

13.D.3



The Do's (13.D.3 cont.)

<i>Things To Do for Women/Men...</i>	<i>agree</i>	<i>disagree</i>
Professional hairstyles		
Cover tattoos and take out body rings		
Check your attire before leaving the house and make sure everything fits correctly		
Wear an outfit that is standard business casual attire		
Get your clothes ready the night before, so you do not have to spend time getting them ready on the day of your appointment		
Check to make sure your clothes are clean and wrinkle-free		
Polish your shoes		
Have breath mints and take one before you enter the building of your appointment		
Put your cell phone on vibrate		
Carry portfolio and business items in briefcase or nice folder		
<i>Things To Do for Women...</i>		
Wear sports jacket with coordinated pants or skirt (casual is most likely appropriate)		
Skirts should be long enough so you can sit down comfortably		
Wear a coordinated blouse		
Wear professional stockings or pantyhose; neutral colors		
Wear conservative shoes		
Not too much jewelry (necklace/bracelet/earrings);		
Light make-up		
Neatly manicured clean nails		
<i>Things To Do for Men...</i>		
Wear sports jacket with coordinated pants (casual is most likely appropriate)		
Wear long sleeve shirt (white or coordinated with the jacket)		
Wear a belt or dress suspenders		
Wear dress socks in appropriate color (no tube or sport)		
Avoid too much jewelry (little or none is better)		
Keep facial hair shaved or trimmed		
Limit the aftershave and cologne		
Have neatly trimmed, clean nails		

Retrieved August 2011: <http://jobsearch.about.com/od/interviewattire/a/interviewnot.htm>

13.D.3

