

# **SERVICE FIRST**

## **VIDEO LIBRARY**

**— Facilitator Guide —**

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# WELCOME

## TO A CUSTOMER SERVICE EXPERIENCE

### "SERVICE FIRST"

**SERVICE FIRST** is the Customer Service Training Video Library offered by Service Quality Institute – The Global Leader in Customer Service.

The key to total quality service is the orientation of all resources and people in a company working together to achieve customer satisfaction.

Service is a part of selling, warehousing, delivery, inventory, order selection, labor power, employee relations, adjustments, correspondence, billing, credit, finance and accounting, advertising, public relations, even maintenance and data processing. There is a service element in every activity performed by every employee which can ultimately have an impact on customer satisfaction.

A company is only as good as its employees. In today's competitive marketplace, there has never been a better time to enhance the service skills and job performance of all employees.

For more than two decades, Service Quality Institute has designed and produced video based customer service learning systems which have been successfully used by organizations around the world. Today, more than ever, companies both large and small seek cost effective and "easy to implement" quality service training for employees. In response to those needs, we are pleased to introduce the *Service First Video Library*.

The Service Quality Institute would appreciate any feedback you might have on the *Service First Video Library* and the discussion guides. Please forward such feedback to the address mentioned below.

Should you require any further information regarding Service Quality Institute and our Customer Service Training Programs please contact:

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[www.yourservicefirst.com](http://www.yourservicefirst.com)

## PROGRAM DESIGN

The *Service First Video Library* is a video based learning system for use in many businesses. It teaches the skills needed to demonstrate Quality Customer Service at the front-line.

*Service First* provides your employees the means to learn the basics of Customer Service:

- Teamwork development
- Positive communication
- How to handle irate customers
- Self-esteem skills
- Speaking
- Listening
- Keeping promises
- Performing
- Learning
- Handling difficult situations

*Service First* will help to improve morale and interpersonal communications and reduce complaints.

The video series includes 12 videos, 13-18 minutes in length. Sessions can be 15 minutes in length or expanded up to an hour or more by using the discussion guide and PowerPoint presentation which accompanies each video. Videos can be passed from department to department, offering each department manager total flexibility in scheduling their training sessions. The *Service First* series is ideal for training new employees and is also excellent for self-study. It is available in English, Spanish, and Hebrew. Soon it will be available in Portuguese and Korean.

This Video Series is suitable for inexperienced facilitators who have lots of enthusiasm, peer respect, and a belief in superior service. It is recommended that the sessions be facilitated in order to gain maximum learning.

A private Internet address has been included for your convenience to make additional copies of the discussion guides and answer sheets. If you have not been given the registration address, please write, fax, e-mail, or call Service Quality Institute to get the confidential code, which is only available to clients. The typing was done in Microsoft Word 7. Please ensure that the copies are of good quality. Contact Service Quality Institute if you have any problems loading the software at [info@yourservicefirst.com](mailto:info@yourservicefirst.com)

## **TRAINING METHOD**

The best method is to use the media and the training sessions in pre-structured workshops.

All training sessions are identically designed:

1. Introduction
2. Playing the media
3. Discussion of main messages
4. PowerPoint Presentations (optional)
5. Incorporate information relative to the surroundings and organizational goals
6. Question/Answer

When necessary, employees may be also allowed to watch the tapes by themselves, with no facilitator. In this way, the media becomes an innovative tool for training. It is especially effective for organizations that recruit new employees frequently and in small numbers.

The order of topics is not binding. The kit may be used flexibly in line with the special needs of the group and organization.

### **Size of the Group**

As stated above, *Service First* may be used for individual training, training of small groups and of the entire organization.

### **What You'll Need**

Training area – Appropriate media playing equipment - Copies of discussion guides  
PowerPoint projector, computer & screen or overhead projector and screen  
Answer sheet copies - Optional: copies of Rules for Role Play and Observer's Checklist

Discussion guides to be used during the workshop are provided in this manual. The questions promote better assimilation of the skills and tools learned. It is advisable to prepare in advance copies of the guides for all participants.

The answer sheets are also provided at the end of this guide. They contain the answers for the questions asked. The proposed answers are based on the media played during the sessions and provide the basis for facilitation. It is possible and desirable to expand the answers provided and find additional ones specifically suitable to organization and its daily life. Suggestions for an expanded workshop and experiential learning, utilizing role-plays, are provided on the next few pages.

Enclosed is a very detailed leader guide to be used with a PowerPoint or overhead projector. It provides a step-by-step script for implementing *Service First* when you choose to use visuals to expand the impact.

If you choose to use overheads, you will need an overhead projector and screen. We encourage you to make copies of the overheads in color. The attention and retention will be higher.

## **PRACTICE ROLE PLAY**

Practice role-plays can be used to emphasize the message being taught in the module. Role plays also allow participants the opportunity to practice the new technique(s) that is to be developed.

It is critical that the role play be as similar to reality as possible. Practice role-play situations can be developed:

1. Prior to the workshop - Request that each participant submit a situation relative to the topic being learned.
2. During the workshop - Let the group decide on a situation.
3. Leader driven - As leader, prepare a specific scenario prior to class (this may be a hot button at your organization or something you'd like to address in detail).

### **Suggestions for Practice Role Play**

#### *Option A*

#### **Directions:**

Select two participants from the participants to "act" a specific situation. One acts as the *customer* and the other as the *service provider*. The *service provider* is to demonstrate the techniques and skills he/she has learned in the training session. The remaining participants act as observers. (Observation checklist is provided on page 10.)

#### *Option B*

#### **Directions:**

In groups of three, choose who will play the role of the *customer*, the *service provider* and the *observer*. The *observer's* job is to pay attention to how well the employee is providing service and working toward a win/win situation with the customer. (Observation checklist is provided on page 10.)

## Use of the Facilitator Guide

This facilitator guide is a complete reference for conducting *Service First*. Ease of implementation is assured through the following format features:

- ❑ Scripting for each session is provided for you and is identified by passages of bold type.
- ❑ Answers, learning points, and directions are enclosed by parentheses and appear directly below the script/text. These examples are provided to lead the participants in the proposed direction only if they cannot generate ideas on their own. The facilitator guide also contains directions for a variety of exercises.
- ❑ Graphic symbols will flag activities. Key symbols will be found in the left-hand margin of the facilitator guide. These can be used as a visual reference. Key symbols are as follows:



**OVERHEAD**



**VIDEO**



**GROUP ACTIVITY**



**INDIVIDUAL  
EXERCISE**



**PAIRS  
EXERCISE**

## OPTIONAL TRAINING STYLES

Instead of using overheads or PowerPoint, you may be more comfortable creating flip chart pages. It also may be the only realistic methods of implementing *Service First*. A positive to flip chart pages is that you create a visual of what is being learned by taping the pages around the room. You actually build the program as you go. This will serve as a continual reinforcement. Keep the pages for future groups you will be teaching.

## OPTIONAL TRAINING TIPS

- Present little gifts of recognition to participants who volunteer or offer valuable inputs.
- Always call participants by their first name.
- Have name tags or name cards for participants if they come from a variety of work areas.
- Use your organization's name as often as possible. Rephrase questions so they are more relevant to your organization.
- For those individuals that turn in their discussion guides, create an incentive item that is recognition based or have the participants fill out a form for a drawing to win a particular item.
- You can easily change the graphics on the discussion guides to include your organization.

## DURING THE MEETING

As a meeting facilitator, you have three important responsibilities:

1. One is to guide the participants through the meeting in logical, orderly pattern ending with the accomplishment of the meeting's purpose.
2. The second is to encourage, and get, participation when you and the group need and want it.
3. The third is to maintain control of the meeting...to keep it on track and on time.

## **Guide the Participants**

The facilitator guide contains a script for the facilitator. The script helps you establish and adhere to an agenda for each session. As a structured approach to customer relations and customer service, each session is important. Don't be tempted to take shortcuts or eliminate portions of the sessions. In fact, add relevant information or questions that participants will relate to.

If you are asked a question and you don't know the answer, DO NOT make it up. Tell the group you will find out from the proper authority and report the answer at the next meeting.

## **Encourage Participation**

If you don't know all the participants on a first-name basis, be sure to review the list of those who are scheduled to attend. Ask the participants to make a name card when they arrive. Addressing the participants by their first names during the sessions establishes a friendly and non-threatening environment to group learning.

- Ask open-ended questions...that is, questions that can't be answered with a yes or no. The questions in this facilitator guide are examples of such questions.
- Reinforce statements that are on-target with meeting objectives.
- When questions are asked of you, redirect them to the group or to the questioner.
- Use examples from your own personal experience to encourage the group to think along similar lines.

## **Maintain Control**

Even the best facilitators will encounter problems from time to time. Whenever groups of people convene, group members will differ in personality, past experience, perceptions and purpose in attending. These differences mean that many needs will be addressed besides those that are built into the facilitator guide and schedule.

There may be challenging participants who prevent others from achieving the objectives of the course. The challenge for you is to progress with the material without alienating any of the participants or jeopardizing the positive climate you want to maintain through the course.

Here are some of the more familiar behaviors and what you can do:

- ❑ Disruptive, negative, challenging, critical comments.  
Ignore off-target remarks. Do not call attention to the behavior.
- ❑ Side conversations, wandering off the topic and the formation of small groups of friends or coworkers.  
Ask questions, of these individuals, specifically related to the task at hand.
- ❑ Participants stray from the main topic.  
Ask the group's opinion as to whether or not a certain subject is on target or not with the agenda.  
Restate relevant points of the agenda when the discussion veers from objectives.
- ❑ Domination by one or more participants with personal stories and needs.  
When one person is dominating the discussion, thank them for their input and tactfully, but firmly, ask him/her to allow others to speak.

## **THE PROGRAM ORGANIZATION/METHODS OF IMPLEMENTATION**

To achieve established goals, *Service First* should be conducted in a systematic organized way. Each video contains a different customer service topic.

*Service First* was divided into twelve sessions to give you a great deal of flexibility in adapting the program to a variety of scheduling requirements. For example:

1. Present one video each month for 12 months.
2. Present one video every two weeks for 24 weeks.
3. Present one video each week for 12 weeks.
4. Present one video each working day for 12 working days.

You can review in the sequence numbered or choose to cover videos that touch on subjects that urgently need to be covered.

Employees can also take the videos home with their discussion guide to hand in and review the next day. Inspect what you expect.

An employee can also take the video to a conference room by themselves, complete the discussion guide, and then review later that day with you.

Workshops can be 30 to 120 minutes long. It's up to you or your organization to select the amount of time that will be made available. Ideally, we encourage you to spend at least one hour in each workshop.

## DEFINE YOUR SERVICE PHILOSOPHY

The *Service First* series was designed as a training tool to assist organizations with training and development of their employees on service delivery excellence.

Before you start using the video series, take time to discuss and put in writing the service philosophy of your organization. This philosophy can then be reflected in all training sessions on service excellence. The integration of this philosophy in the *Service First* workshops will help link the newly learned techniques and skills with daily life of the organization's culture.

The questions below are meant to help you formulate your organization's service philosophy.

1. What is our definition of service and exceptional service?
2. Which needs or problems require us to improve the service we provide?
3. In which areas or departments must we improve the service?
4. How should we handle complaints and angry customers, and who is authorized to handle them?
5. Is teamwork important for providing service?
6. Do we stress positive communication (verbal and non-verbal)? Why is that important?
7. How can we make sure we understand the customer's needs? How can we implement questioning and listening skills?
8. How is superior service delivered on the phone? What is the right way to answer the telephone?
9. How can we satisfy our customers?
10. How important is it for us that our people use their discretion when handling an angry customer? What are the limits on the authority?
11. How can we test and measure service performance? What shall we do with the results obtained?
12. What can we do to make the customer feel he/she is the most important thing for our company? How can we provide customers with value-added service?
13. What benefits do we stand to gain from improved service?
14. How would improved service affect the organization as a whole?

**SERVICE FIRST  
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**DISCUSSION GUIDES**

Service Quality Institute clients who have purchased the *Service First Video Library* have permission to copy the discussion guides and distribute to employees. You may also utilize the disc provided to ensure quality copies or to personalize them to your organization.

# 1 Your Key to Customer Satisfaction

## DISCUSSION GUIDE

1. What percentage of dissatisfied customers switch to a competitor because of poor service?  
Check the correct answer.

\_\_\_\_\_ 20%

\_\_\_\_\_ 30%

\_\_\_\_\_ 40%

2. List five benefits to our organization if we can get customers to return more often.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

3. Identify the difference between internal and external customers.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. Who are the people at work (internal customers) that count on you?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Copy this sheet and hand out to participants.*

# SERVICE FIRST

The Customer Service First Video Library

## 1 YOUR KEY TO CUSTOMER SATISFACTION

5. In order to provide quality service to both internal and external customers, which five principles must we practice every day?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

6. What are some of the reasons why you are important to the company?

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### ACTION PLAN

On a scale of 1 to 10, with 10 being the best, how would you rate the quality of service we provide to our customers? Circle one.

1      2      3      4      5      6      7      8      9      10

Make a list of five customer-service related issues or topics you would like to learn more about.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

NAME \_\_\_\_\_ DEPT. \_\_\_\_\_

SUPERVISOR/MANAGER \_\_\_\_\_

DATE ATTENDED \_\_\_\_\_

PARTICIPANT SIGNATURE \_\_\_\_\_

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**ANSWER KEYS**

# 1 Your Key to Customer Satisfaction

## ANSWER SHEET

1. What percentage of dissatisfied customers switch to a competitor because of poor service?  
Check the correct answer.  
**The correct answer is 40% of dissatisfied customers switch to competition because of service.**
2. List five benefits to our organization if we can get customers to return more often.  
**Accept all answers. Benefits include:**
  - increased sales
  - higher wages
  - better benefits
  - positive working experience
  - positive word-of-mouth advertising
  - fewer complaints
3. Identify the difference between internal and external customers.  
**External customers buy a product or service. Internal customers are co-workers.**
4. Who are the people at work (internal customers) that count on you?  
**Accept all answers.**
5. In order to provide quality service to both internal and external customers, what five principles must we practice every day?
  1. **Feel good about yourself**
  2. **Practice habits of courtesy**
  3. **Use positive communication**
  4. **Listen and ask questions**
  5. **Perform professionally**
6. Mention 2 or more reasons why you are important to the company?  
**Accept all answers.**

### ACTION PLAN

**Answers to the Action Plan will be as individualized as the participants completing it. General responses should indicate that the participants have listened to and understood the concepts presented in this training video. However, allow for creative and thoughtful responses.**

**As an option, and depending on your training style, you may choose to use the Action Plan as a group exercise. Form teams of three or four, and allow the teams to compile a master list. Fifteen to twenty minutes should allow sufficient time for completion. Have a representative from each team to present his or her list to the group.**

## 2 Teamwork Development

### ANSWER SHEET

1. What is the definition of teamwork?  
**The action or effort of people working together as a group.**
2. What are some of the benefits of working as a team?  
**General responses may include:**
  1. **Accomplish more**
  2. **Makes everyone's job easier**
  3. **Pleasant work environment**
  4. **Better able to satisfy customers**
  5. **Everyone works toward a common goal**
3. List the four things that are important to successful teamwork.
  1. **Objectivity**
  2. **Helpful criticism**
  3. **Active listening**
  4. **Support**
4. Are there any obstacles that prevent you or your team from performing successfully?  
**Accept all answers.**
5. What are the four necessary teamwork practice skills?
  1. **Define team goals**
  2. **Define team approach**
  3. **Define necessary skills**
  4. **Hold yourself accountable**

### SELF-ASSESSMENT

**Answers to the self-assessment will be as individualized as the participants completing it. General responses should indicate that the participants have listened to and understood the concepts presented in this training video. Allow for creative and thoughtful responses.**

## 3 HANDLING COMPLAINTS AND THE IRATE CUSTOMER

### ANSWER SHEET

1. Why should complaints be considered "opportunities"?  
**Possible responses include: if we never hear about problems, we can't correct them, complaints offer important feedback, dissatisfied customers who don't complain don't return, complaints give an opportunity to make things right.**
2. The average business only hears from 4% of its dissatisfied customers. What do the other 96% do?  
**Not only they don't return, but they tell 9 or 10 other people about the poor service they received. Result is poor word-of-mouth advertising.**
3. What is the easiest type of complaint to resolve?  
**A specific problem that can be easily traced or identified.**
4. What are the four basic steps you should take when handling a specific problem?
  1. **focus on the problem**
  2. **take responsibility**
  3. **offer solutions or alternatives**
  4. **say "thank you"**
5. More complex problems require expanding on these four basic steps. What other two skills are needed to diffuse difficult situations?
  1. **don't become defensive**
  2. **get help if necessary**
6. Handling irate customers can be a hard and stressing experience. How can we keep ourselves from taking it personally?  
**Use self-talk to maintain a positive attitude for the next customer.**
7. What must you do in order to be a "Class Act"?  
**C**ourteous  
**L**isten  
**A**sk Questions  
**S**oothe  
**S**olve  
  
**A**pologize  
**C**ontrol  
**T**hank