



Ultimate Basic Business Skills

Training an Effective Workforce

ASTD Ultimate Series



CHRISTEE GABOUR ATWOOD



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The ASTD Ultimate Series



ASTD Press's *Ultimate* series is a natural follow-on to the popular *Trainer's WorkShop* series. Like the *Trainer's WorkShop* series, the *Ultimate* series is designed to be a one-stop, practical, hands-on road map that helps you quickly develop training programs. Each book in the *Ultimate* series offers a full range of practical tools you can apply or adapt to a variety of training scenarios. As in the *Trainer's WorkShop* series, you will find exercises, handouts, assessments, structured experiences, and ready-to-use presentations, along with detailed facilitation instructions. So what's the difference? The *Ultimate* series aims to present the full scope of various topics, offering today's overcommitted training professionals even MORE practical and scalable help: More practical exercises, handouts, assessments, and other ready-to-deploy training solutions. More detailed instructions. Broader topic coverage. More downloadable material. In short, more value for your training budget dollars.

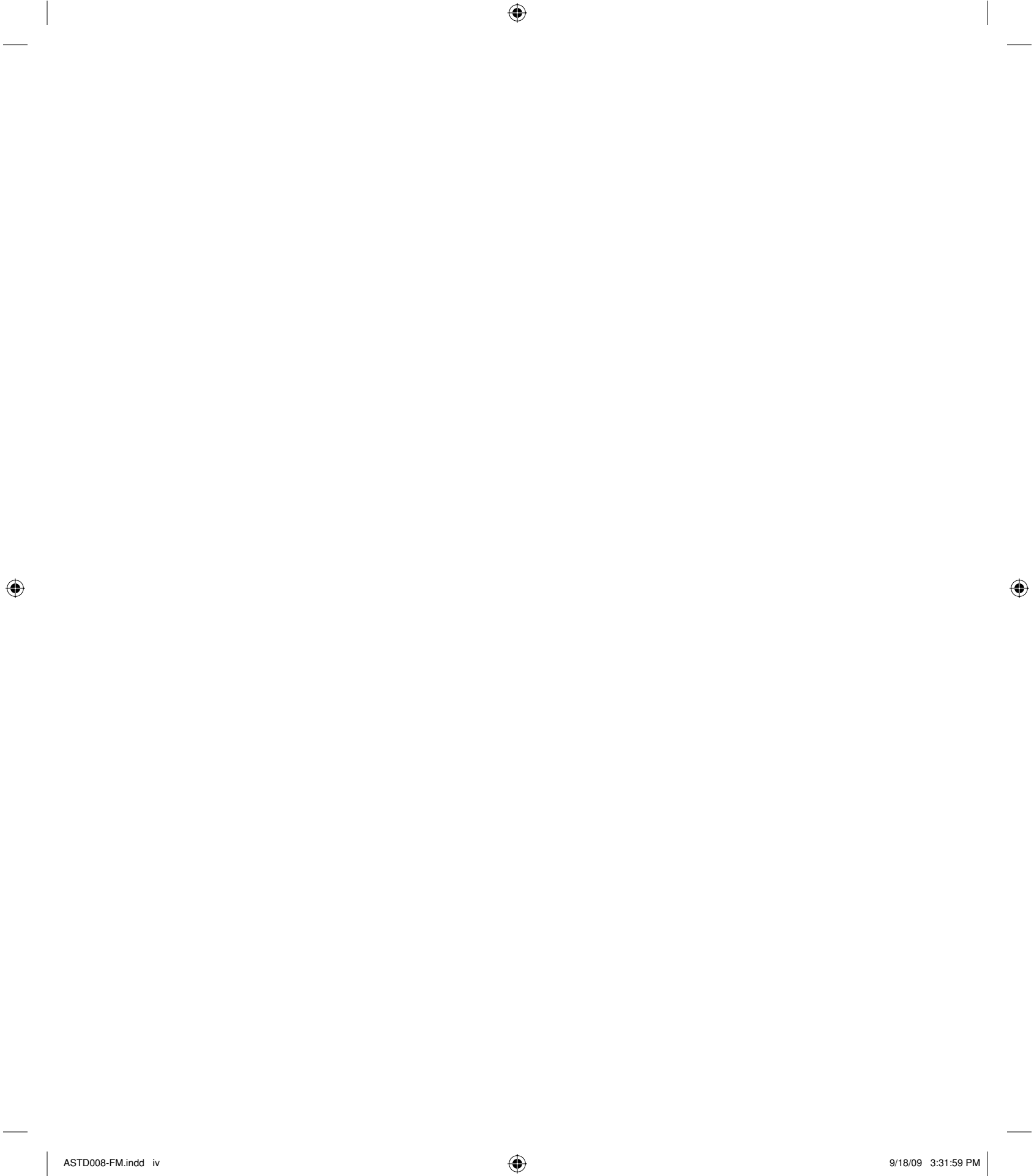


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Preface



This publication can be described as a “training department in a book.” It offers ready-to-present programs for some of the most valuable professional skills that the members of an organization can learn. It creates a foundation of courses for the organization’s training department, which frees learning professionals to concentrate their efforts on the current challenges specific to their organizations but to still offer a core curriculum of programs that address the ongoing needs of their workforce.

Ultimate Basic Business Skills: Training an Effective Workforce focuses on the skills needed by every individual in an organization. The chapters on customer service skills offer development programs to help not only in serving and creating loyal customers, but also in partnering with internal customers to create a stronger team. The section on interpersonal skills addresses those practices that allow the organization’s members to communicate more effectively and thereby reduce the misunderstandings that can occur in interactions between different personalities and backgrounds. The business skills chapters offer training to enhance organizational abilities and improve business documentation and processes. The section on professionalism equips participants to present a positive image and to practice the behaviors that represent a strong and focused member of the business world.

Each of the five sections contains complete modules—with all materials needed for facilitation. Each module is designed as a half-day session but includes notes and optional activities to allow expansion to a longer session, if desired. The separate modules can also be blended to provide specialized workshops tailored to an organization’s specific needs.

The half-day training sessions are excerpted from or based on other books from ASTD Press—and therefore draw on the expertise of the outstanding authors of ASTD Press. I’ve added, updated, and modified this material from my own perspective as an experienced trainer. Each module notes the ASTD publications from which its materials are excerpted, so learning professionals can refer to those volumes to develop more in-depth understanding and training programs on any of the topics presented in this book.

This book is designed to help learning professionals offer a variety of business skills to all individuals in their organizations. The need for these types of professional skills is not restricted to any single department. For example, the skills that help customer service representatives develop and maintain loyal customers can also be valuable to others in the organization who will never encounter an external customer. That’s because those same interpersonal skills can be applied to dealings with co-workers and other business partners. Likewise, the organizational skills that help project managers complete their work on deadline and achieve quality outcomes can also help supervisors ensure the successful

completion of tasks in their departments. Moreover, everyone in the organization uses communication skills during every interaction with co-workers, vendors, and members of the community.

As part of the *Ultimate* series, *Ultimate Basic Business Skills: Training an Effective Workforce* serves the mission of these books by creating a well-rounded training department in volumes that learning professionals can use to expand their training offerings immediately and answer the needs of organizations to compete in the global workplace.

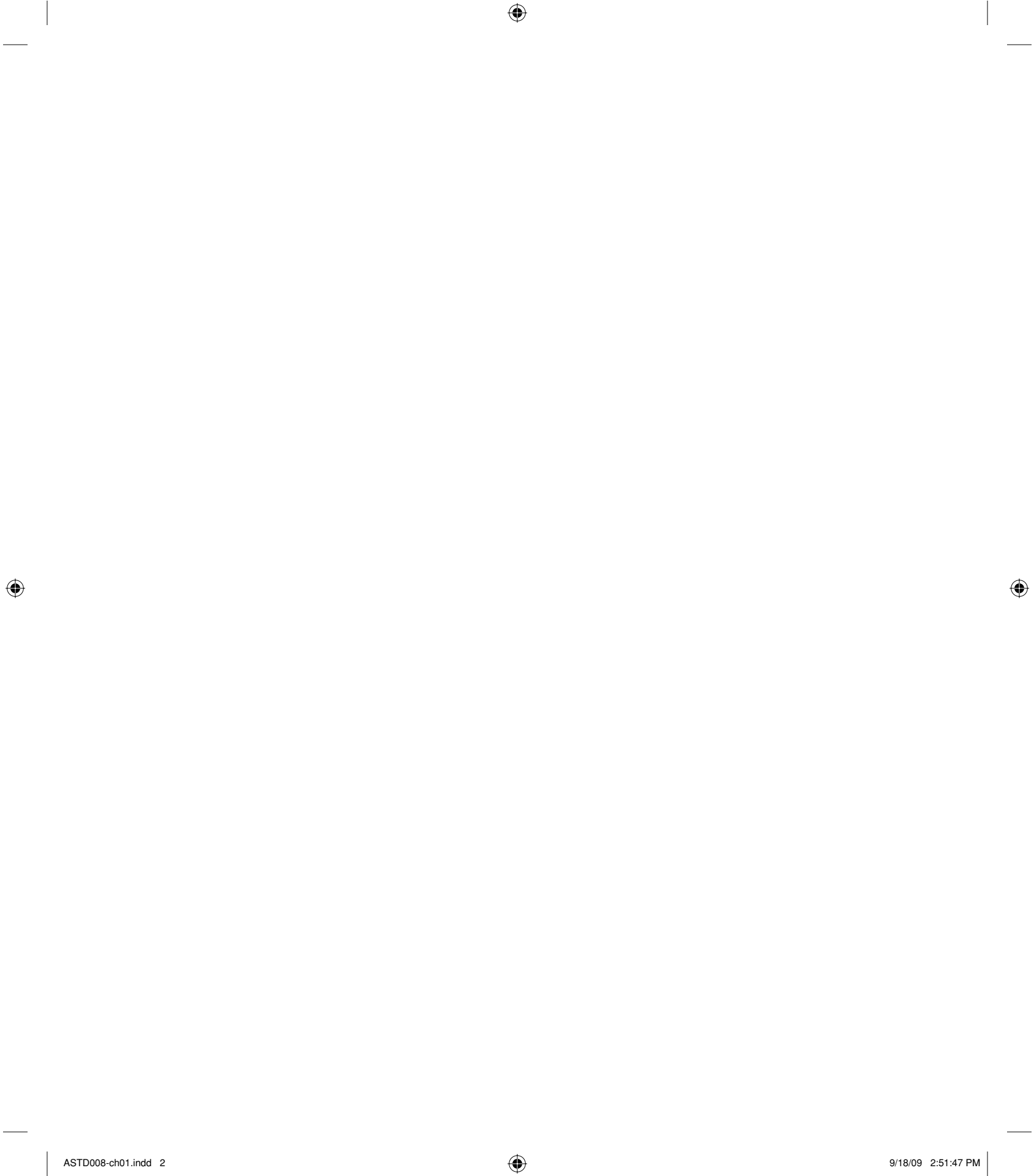
In the words of President John F. Kennedy, “Leadership and learning are indispensable to each other.” *Ultimate Basic Business Skills* strives to create the learning opportunities that will develop the leaders of tomorrow’s workforce.

Christee Gabour Atwood
Alexandria, Louisiana
October 2009



Section One: Getting Started





How to Use This Book

1

What's in This Chapter?

- Discussion of the benefits of business skills training
- Explanation of how to use this book for best results
- Description of what's in this workbook and the accompanying CD



Why Business Skills Training?

What makes a business successful? We can include outstanding products, valuable services, sound business practices, financial acumen, a solid reputation, and the list goes on.

All these standards of success have one element in common: people. An individual in the workforce creates, produces, and improves those outstanding products. An employee delivers that valuable service and generates loyalty by meeting and exceeding customer needs. Individual leaders in the organization design and enforce those sound business practices. Financial acumen arises from years of those individuals' experiences and their ability to continue to build on that foundation. The company's solid reputation emerges as a result of the daily activities of those employees.

Organizations that want to continue this pattern of growth are wise to invest in those individuals. Past experience has shown us that training increases not only employees' knowledge, but also their job satisfaction, and this translates into the improved retention rates that benefit organizational success. Moreover, training in business skills creates the foundation for those employees to advance to new roles in the organization.

Business skills encompass a wide range of competencies, and the programs presented in this book offer the groundwork to enhance those proficiencies. Future volumes will allow more specialized training to address the evolving needs of the workforce.

How Can These Workshops Help?

The individuals in a company create its knowledge base and continue to build on that base as they learn lessons, share best practices, and adapt procedures to incorporate their new knowledge. Organizations increase the productivity and the satisfaction level of these individuals by introducing them to improved methods of communication, customer interaction, personal management, and other valuable business skills.

Improved employee practices, increased retention, and a continued commitment to build on current knowledge all help to strengthen organizations' practices. Those practices include the success factors we mentioned earlier: product development, outstanding service, sound business practices, financial acumen, and reputable standing in the business world.

Who Needs These Courses?

These courses represent a sound investment for individuals at all levels of development in the organization. Forward-thinking organizations have discovered that the time for career planning is as soon as a new employee joins their ranks. They have also discovered that training and development should begin at the same time.

Ideally, these courses will include individuals from all areas of the organization so they can develop networks beyond their departments as they learn the materials offered in the sessions. Although these courses are not expected to be cures for performance problems, they are designed to work in conjunction with performance management and coaching procedures to help struggling employees improve.

How to Use This Workbook

Whether you're an experienced facilitator or a novice instructor, you'll find that this workbook is a useful resource to develop and facilitate workshops on business skills. You can substitute exercises or segments to customize the programs to meet the specific needs of your audiences. This book is not intended to be read cover to cover; rather, the workshops should be implemented as needed.

Here are the training materials included in this book and on the accompanying CD:

- guidelines to design your business skills workshops
- materials and instructions to facilitate your training sessions
- tools to evaluate the workshops
- training workshop formats and agendas that incorporate a range of training activities. (You can use these exactly as they appear in the book or modify them to suit your organization's need and your facilitation style.)
- learning activities, tools, and assessments designed to support the workshops
- Microsoft PowerPoint presentations to accompany each workshop format. You'll find thumbnails of the slides at the ends of the chapters in which they are referenced. The CD also contains color versions of the slides that can be printed three-to-a-page and used as class handouts.

All assessments, instruments, and tools can be found on the CD. Copy them in advance to create packets for each attendee. You'll distribute the rest of the handouts and tools at appropriate times during the workshop.

Here are some suggestions to help you use this book effectively:

- *Skim the book.* Browse the table of contents of this workbook. Study the lists in the **What's in This Chapter** sections. Get an overall sense of the layout and structure of the information included.
- *Be sure you understand the concepts of basic business skills.* To study the overview of business skills, review the chapters that introduce each category. Chapter 3 gives the overview of customer service skills, and chapter 8 explains the content of the courses that comprise the section on interpersonal skills. Review chapter 13 to understand basic business skills. An overview of professionalism is offered in chapter 18. In addition, you can consult some of the resources listed at the end of each workshop chapter to find additional information and programs that offer extended training on any of the included topics.
- *Assess the benefits of improved business skills for your organization.* Take the time to consider the benefits of business skills training and how that could advance your organization's goals. For example, imagine how efficiency could be improved if members of the workforce practiced effective time management and project management techniques. Consider how employee collaboration could be enhanced through effective communication skills and evaluate how a higher level of professionalism could affect your organization's image and reputation.
- *Review the methods to present a high-impact program.* Chapter 2 outlines ideas to make your program successful. You'll learn techniques to help attendees become more comfortable as they participate in the activities and practice sessions during the course of the workshop. You can set an example for attendees as you model the collaboration and communication behaviors you want them to develop.
- *Study the sample program agendas.* Review the agendas for the sessions to decide which format will address and satisfy your group's specific needs. Go through each agenda, even if you don't plan to present all of the workshops at this time. You may discover an exercise in one agenda that isn't included in the format you plan to use but that would be a great benefit to your specific participants. Just replace an exercise in the agenda you're using with one from the other programs. The time listings on each activity will help you make replacements and adjust the schedule to fit your desired workshop length.
- *Customize your training program.* Because this workbook includes everything you need for a workshop, you can use your time to make the program your own instead of creating agendas and formulating exercises. Mold it and incorporate your own personality to make the presentation suit your style. When the program fits you, you'll get more pleasure from your presentation, and you'll communicate the concepts to your learners more effectively.

What's on the CD?

All assessments, tools, training instruments, and PowerPoint slides used in this workbook are included on the accompanying CD. Follow the instructions in the appendix, “Using the Accompanying Compact Disc,” at the end of the workbook, or read “How to Use This CD” on the CD itself.

Icons

For easy reference and to help you quickly locate specific materials and tools for training design and instructions, icons are included in the margins throughout this workbook and in the learning activities. Here are the icons and what they represent:



Assessment: Appears when an agenda or learning activity includes an assessment.



CD: Indicates materials included on the CD accompanying this workbook.



Clock: Indicates suggested timeframes for an activity.



Instructions: Identifies step-by-step instructions for completing the learning activity.



Learning Activity: Indicates a structured exercise for use in a training session.



Materials: Indicates what is required to conduct the session.



Objectives: Identifies training goals for developing skills during that particular session.



PowerPoint Slide: Indicates PowerPoint presentations and individual slides.



Tool: Identifies an item that offers information that participants will find useful in the training session and on the job.



Training Instrument: Indicates interactive training materials for participant use.



What to Do Next: Denotes recommendations for what to do after you have completed a particular section of the workbook.

In the next chapter, we will discuss workshop preparations to ensure that you will have sufficient time to set up the room and prepare the participant materials. In addition, you will find instructions for preparing participant materials for each workshop as well as an explanation of the principles of effective facilitation.



What to Do Next

- Study the contents of the workbook to familiarize yourself with the material it offers.
- Complete the assessments in the workbook to rate your own business skills and to determine your areas for development.
- Review the contents of the CD and open some of the items, so you understand how the materials are organized and accessed.

