

ATD Workshop Series

CUSTOMER SERVICE training



**Includes All the Activities, Handouts, Tools, and Assessments
You Need to Create and Deliver Powerful, Effective Training**

KIMBERLY DEVLIN

CUSTOMER SERVICE training

ATD Workshop Series

CUSTOMER SERVICE training

KIMBERLY DEVLIN

atd

PRESS

Alexandria, Virginia



© 2015 by Kimberly Devlin.
All rights reserved. Printed in the United States of America.

18 17 16 15 1 2 3 4 5

No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other noncommercial uses permitted by copyright law. For permission requests, please go to www.copyright.com, or contact Copyright Clearance Center (CCC), 222 Rosewood Drive, Danvers, MA 01923 (telephone: 978.750.8400; fax: 978.646.8600).

ATD Press is an internationally renowned source of insightful and practical information on talent development, workplace learning, and professional development.

ATD Press
1640 King Street
Alexandria, VA 22314

Ordering information for print edition: Books published by ATD Press can be purchased by visiting ATD's website at td.org/books or by calling 800.628.2783 or 703.683.8100.

Library of Congress Control Number: 2015945660 (print edition only)

ISBN-10: 1-56286-968-X
ISBN-13: 978-1-56286-968-7
e-ISBN: 978-1-60728-435-2

ATD Press Editorial Staff:

Director: Kristine Luecker
Manager: Christian Green
Community of Practice Manager, Learning & Development: Amanda Smith

Trainers Publishing House (TPH) Staff:

Publisher: Cat Russo
Project, Editorial, and Production Management: Jacqueline Edlund-Braun
TPH Copyeditor: Tora Estep
Cover and Text Design: Ana Ilieva Foreman/Design
Composition: Kristin Goble, PerfectType, Nashville, TN, and Debra Deysher, Double D Media, Reading, PA

Cover art: Shutterstock
Presentation Slide and Handout Art: Fotolia
Printed by Data Reproductions Corporation, Auburn Hills, MI, www.datarepro.com

The ATD Workshop Series

Whether you are a professional trainer who needs to pull together a new training program next week, or someone who does a bit of training as a part of your job, you'll find the ATD Workshop Series is a timesaver.

Topics deliver key learning on today's most pressing business needs, including training for communication skills, leadership, coaching, new supervisors, customer service, new employee orientation, and more. The series is designed for busy training and HR professionals, consultants, and managers who need to deliver training quickly to optimize performance now.

Each ATD Workshop book provides all the content and trainer's tools you need to create and deliver compelling training guaranteed to

- **enhance** learner engagement
- **deepen** learner understanding
- **increase** learning application.

Each book in the series offers innovative and engaging programs designed by leading experts and grounded in design and delivery best practices and theory. It is like having an expert trainer helping you with each step in the workshop process. The straightforward, practical instructions help you prepare and deliver the workshops quickly and effectively. Flexible timing options allow you to choose from half-day, one-day, and two-day workshop formats, or to create your own, using the tips and strategies presented for customizing the workshops to fit your unique business environment. Each ATD Workshop book also comes with guidance on leveraging learning technologies to maximize workshop design and delivery efficiency and access to all the training materials you will need, including activities, handouts, tools, assessments, and presentation slides.

Contents

FOREWORD by Tony Bingham	xv
PREFACE	xvii
INTRODUCTION: HOW TO USE THIS BOOK	1
Why Is Developing Customer Service Skills Important?	1
Which Program Is Best?	2
<i>Half-Day Workshop: Service Behaviors That Matter</i>	2
<i>One-Day Workshop: From the Customer's Perspective</i>	2
<i>Two-Day Workshop: A Total Approach to Service</i>	3
How Much Time Will Preparation Take?	3
What Do I Need to Know About Training?	3
What Are the Important Features of the Book?	5
How Are the Agendas Laid Out?	6
How Do I Use This Book?	7
Key Points	8
What to Do Next	8
Additional Resources	8
SECTION I: THE WORKSHOPS	9
1 HALF-DAY CUSTOMER SERVICE WORKSHOP: SERVICE BEHAVIORS THAT MATTER	11
Half-Day Workshop Objectives: Service Behaviors That Matter	12
Half-Day Workshop Overview	12

A Word About Presentation Slides and Handouts	13
Half-Day Workshop Agenda	13
What to Do Next	20
2 ONE-DAY CUSTOMER SERVICE WORKSHOP: FROM THE CUSTOMER'S PERSPECTIVE	23
One-Day Workshop Objectives: From the Customer's Perspective	24
One-Day Workshop Overview	24
A Word About Presentation Slides and Handouts	25
One-Day Workshop Agenda	26
What to Do Next	38
3 TWO-DAY CUSTOMER SERVICE WORKSHOP: A TOTAL APPROACH TO SERVICE	41
Two-Day Workshop Objectives: A Total Approach to Service	42
Two-Day Workshop Overview	42
<i>Overview of Day One</i>	42
<i>Overview of Day Two</i>	43
A Word About Presentation Slides and Handouts	44
Two-Day Workshop Agenda: Day One	44
What to Do Between Workshop Days	51
Two-Day Workshop Agenda: Day Two	52
What to Do Next	60
4 CUSTOMIZING THE CUSTOMER SERVICE WORKSHOPS	61
Customizing the Content and Activities	62
<i>Step One: Get Real</i>	62
<i>Step Two: Be Relevant</i>	63
<i>Step Three: Integrate the Organization's Service Standards</i>	63


Customizing the Workshop Format	64
<i>One-Hour, Themed Sessions</i>	65
<i>Two-Hour Themed Sessions</i>	67
Customizing the Workshop Delivery with Technology	68
The Bare Minimum	69
What to Do Next	69
 SECTION II: ESSENTIALS OF EFFECTIVE CUSTOMER SERVICE TRAINING	 71
 5 IDENTIFYING NEEDS FOR CUSTOMER SERVICE TRAINING	 73
Why Needs Analysis?	74
<i>Strategic Needs Analysis</i>	74
<i>Structured Interviews</i>	76
<i>Focus Groups</i>	76
<i>Surveys</i>	76
Individual Learning Needs Analysis	77
The Bare Minimum	78
Key Points	79
What to Do Next	79
Additional Resources	79
 6 UNDERSTANDING THE FOUNDATIONS OF TRAINING DESIGN	 81
Basic Adult Learning Theory	82
More Theoretical Ideas Important to Learning	83
<i>Multiple Intelligences</i>	84
<i>Whole Brain Learning</i>	85
Theory into Practice	86
<i>Establishing a Framework</i>	86

<i>Identifying Behaviors</i>	86
<i>Practicing</i>	87
<i>Providing Feedback</i>	87
<i>Making It Relevant</i>	87
The Bare Minimum	87
Key Points	88
What to Do Next	88
Additional Resources	89
7 LEVERAGING TECHNOLOGY TO MAXIMIZE AND SUPPORT DESIGN AND DELIVERY	91
Why Consider Learning Technologies?	93
Opportunities to Use Learning Technologies	94
<i>When Designing Training</i>	94
<i>Before Training</i>	95
<i>During Training</i>	96
<i>After Training</i>	97
<i>While Building a Practitioner Community</i>	97
The Bare Minimum	98
Key Points	99
What to Do Next	99
Additional Resources	99
8 DELIVERING YOUR CUSTOMER SERVICE WORKSHOP: BE A GREAT FACILITATOR	101
The Learning Environment	102
Program Preparation Checklist	105
Participant Materials	107
<i>Handouts</i>	107

<i>Presentation Slides</i>	107
<i>Workbooks and Journals</i>	109
<i>Videos</i>	109
<i>Toys, Noisemakers, and Other Props</i>	109
Facilitator Equipment and Materials	109
A Strong Start: Introductions, Icebreakers, and Openers	110
Feedback	111
<i>Role Plays</i>	113
<i>Participant Presentations</i>	113
<i>Ball Toss</i>	114
<i>Journaling</i>	114
Responding to Questions	114
Training Room and Participant Management	115
A Word About Dealing With Difficult Participants	116
An Unforgettable End	119
The Bare Minimum	120
Key Points	120
What to Do Next	120
Additional Resources	121
9 EVALUATING WORKSHOP RESULTS	123
Levels of Measurement	124
<i>Level 1: Measuring Participant Reactions</i>	124
<i>Level 2: Measuring the Extent to Which Participants Have Learned</i>	125
<i>Level 3: Measuring the Results of Training Back on the Job</i>	126
<i>Level 4: Measuring the Organizational Impact of Training</i>	126
<i>Return on Investment</i>	127
Reporting Results	127

The Bare Minimum	128
Key Points	128
What to Do Next	128
Additional Resources	129
SECTION III: POST-WORKSHOP LEARNING	131
10 THE FOLLOW-UP COACH	133
Create a Communication Plan	134
Involve Managers in the Transfer of Learning	135
<i>Before the Workshop</i>	135
<i>After the Workshop</i>	136
Connect Service Standards to Organizational Metrics	136
Focus on Personal Action Planning	137
Continue to Offer Learning Opportunities	137
Create an Open and Encouraging Environment for Quality Customer Service	138
Key Points	139
What to Do Next	139
Additional References	139
SECTION IV: WORKSHOP SUPPORTING DOCUMENTS AND ONLINE SUPPORT	141
11 LEARNING ACTIVITIES	143
Learning Activities Included in <i>Customer Service Training</i>	144
<i>Half-Day Workshop: Service Behaviors That Matter</i>	144
<i>One-Day Workshop: From the Customer's Perspective</i>	144
<i>Two-Day Workshop: A Total Approach to Service</i>	145

12 ASSESSMENTS	179
Assessments Included in <i>Customer Service Training</i>	179
13 HANDOUTS	183
Handouts Included in <i>Customer Service Training</i>	183
<i>Half-Day Workshop: Service Behaviors That Matter</i>	183
<i>One-Day Workshop: From the Customer's Perspective</i>	184
<i>Two-Day Workshop: A Total Approach to Service</i>	185
14 ONLINE TOOLS AND DOWNLOADS	199
Access to Free Supporting Materials	199
Customizable Materials	200
Working With the Files	201
<i>PDF Documents</i>	201
<i>PowerPoint Slides</i>	201
ACKNOWLEDGMENTS	203
ABOUT THE AUTHOR	205
ABOUT ATD	207



Chapter 3

Two-Day Customer Service Workshop: A Total Approach to Service

What's in This Chapter

- Objectives of the two-day Customer Service Workshop
- Summary chart for the flow of content and activities
- Two-day program agenda

Congratulations! If this is the workshop you are choosing to facilitate, you are working with an organization that places a priority on service, has leadership that is open to making big-picture changes in processes and systems, and supports investing time in learning and development. That is significant. Now, it will be your turn to put an emphasis on preparing to lead this workshop. In addition to being the lengthiest of the three workshops, it is also the most fluid. There is a greater need in this design for you to refine the timings based on dynamics of your unique group. You may need to dedicate more time to planning and preparation for this workshop. Be sure to thoroughly review the agenda and learning activities *before* conducting your needs assessment and subject matter expert (SME) interviews to be certain you ask all the necessary questions.

Two-Day Workshop Objectives: A Total Approach to Service

The two-day agenda covers service behaviors, strategies, and systems, with an emphasis on systems, including cross-functional processes. The learning objectives for Day One of the two-day workshop are

- Strengthen internal relationships and awareness of lateral service challenges
- Distinguish service behaviors from service strategies and service systems
- Assess the three aspects of your service environment to target improvement opportunities
- Document a process map for a customer-critical service system.

The learning objectives for Day Two of the workshop are

- Examine the organization's service systems for breakdowns from the customer's perspective
- Improve existing service strategies through mistake-proofing techniques
- Follow a framework for creative problem-solving
- Create team action plans to enhance the service systems documented on Day One
- Identify strategies for managing conflict.

Two-Day Workshop Overview

Overview of Day One

TOPICS	TIMING
Welcome/Learning Activity 26: Wall Graffiti	10 minutes
Program Objectives/Learning Activity 27: Prioritize Learning	5 minutes
Ground Rules/Learning Activity 28: Social Agreements	10 minutes
Learning Objective 1/Learning Activity 29: Now You Know	35 minutes
Learning Objective 1/Learning Activity 30: Group Résumé	25 minutes
BREAK	15 minutes
Learning Objective 2/Learning Activity 31: Interconnected Service Facets	10 minutes
Learning Objective 2/Learning Activity 32: The Root Issue Is?	20 minutes
Learning Objective 3/Learning Activity 33: Performance Improvement Service Levels	15 minutes
Transition to Service Systems	
Learning Objective 3/Learning Activity 34: Field Trip	20 minutes
LUNCH (AND FIELD TRIP)	105 minutes

TOPICS	TIMING
Learning Objective 3/Learning Activity 35: Quick Start—Field Trip Debrief	15 minutes
Learning Objective 4/Learning Activity 36: Working With Cross-Functional Process Mapping	30 minutes
Learning Objective 4/Learning Activity 37: Cross-Functional Process Mapping Our Processes	60-90 minutes
BREAK	included above
Learning Objective 4/Learning Activity 38: Cross-Functional Process Map Reviews	30 minutes
Closing/Learning Activity 39: Day-One Workshop Closure	15 minutes
TOTAL	450 minutes (7.5 hours)

Overview of Day Two

TOPICS	TIMING
Reconnect/Learning Activity 40: Welcome Back!—Quick Start	20 minutes
Learning Objective 5/Learning Activity 41: Control–No Control–Influence (C–NC–I)	30 minutes
Transition to Service Strategies	
Learning Objective 6/Learning Activity 42: Mistake Proofing	20 minutes
Learning Objective 6/Learning Activity 43: Mistake-Proofing Process Map Elements	30 minutes
BREAK	15 minutes
Learning Objective 6/Learning Activity 44: Critiquing Mistake-Proof Techniques	30 minutes
Learning Objective 7/Learning Activity 45: Creative Problem-Solving	35 minutes
LUNCH	60 minutes
Transition to Afternoon/Learning Activity 46: Quick Start	15 minutes
Learning Objective 8/Learning Activity 47: Next Steps to Improve Our Systems	45 minutes
BREAK	15 minutes
Transition to Service Behaviors	
Learning Objective 9/Learning Activity 48: Keep a Cool Head	30 minutes
Learning Objective 9/Learning Activity 49: Quit Taking It Personally (Q-Tip)	30 minutes
STRETCH BREAK	10 minutes
Personalizing the Learning/Learning Activity 50: Living My Legacy	40 minutes
Closing/Learning Activity 51: Day-Two Workshop Closure	25 minutes
TOTAL	450 minutes (7.5 hours)

A Word About Presentation Slides and Handouts

The presentation slides for this workshop have been animated to enhance their effectiveness. They can be used effectively in the pdf format (which are static), but if you choose to use the fully customizable versions and display the slides in slide show mode, many will have motion and builds. These animations are not merely movement; they are structured to enhance the visuals' effectiveness, provide greater facilitative control of group discussions, manage cognitive load by chunking content in keeping with activity instructions, and in some instances, even provide feedback to the participants. Some animations are controlled by advancing the slides, and others are automated for you. This is intentional to guide certain activities and to offer you facilitative flexibility in others. Make time to familiarize yourself with the animations and plan how you will leverage them. You can run the workshop effectively using the pdf versions; however, if you are accessing the presentation slides in their native format through an optional license, be sure to display them in slide show mode to derive their full benefit!

Please note that some slides in this workshop may also appear in the half-day or one-day workshops. Their animations here may be a bit different, in support of this workshop's structure. Please be sure to familiarize yourself with these animations even if you previously reviewed a different workshop's visuals.

Each workshop has been designed as a continuous event. If facilitated that way, it may be logical for you to assemble all of the associated handouts into one bound workbook to distribute to participants when they arrive. In this case, where the learning activities direct you to distribute a handout, you may want to make note of and refer to the appropriate workbook pages during the workshop.

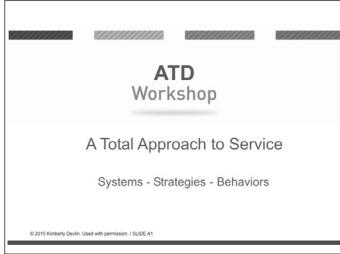

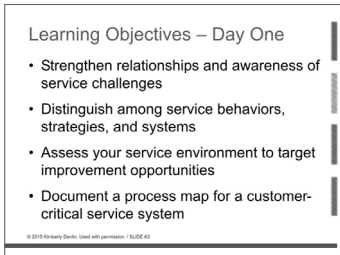

For ease of navigation through the book, learning activities and handouts for all three workshops are numbered sequentially. Therefore, this workshop begins with Learning Activity 26 and the first handout is number 27. Each handout has a name as well. For a seamless participant experience, I suggest you refer to the handouts by name, page number (if bound), or renumber them to begin with number 1.

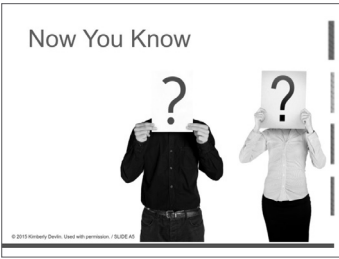
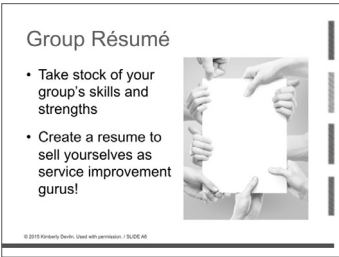
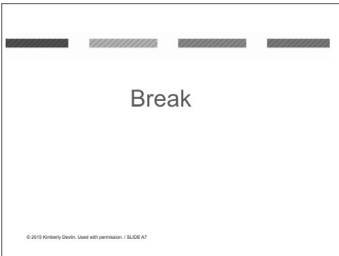
Two-Day Workshop Agenda: Day One

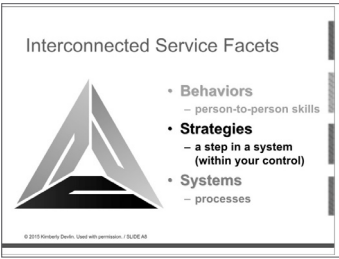
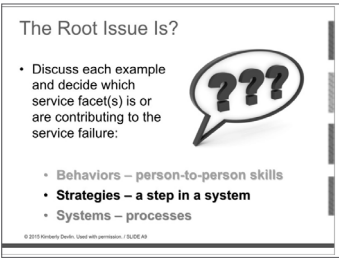
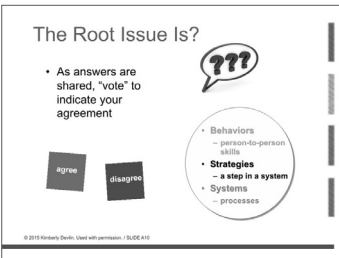
With all that you are focused on when facilitating a workshop, it can be useful to have a quick-reference, birds-eye view to the workshop. This agenda is intended for that purpose. If you are customizing the timings in the learning activities, be sure to update them here too. While I typically use the agenda below as my main reference, I also always have two other tools available to me: the learning activity pages in Chapter 11, which provide the detail in support of the workshop design, and a reference set of the handouts.

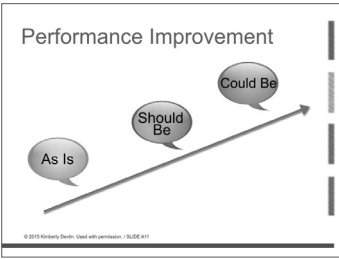
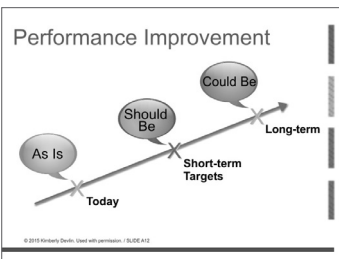
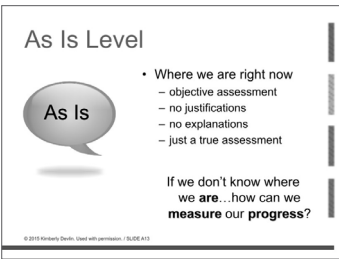
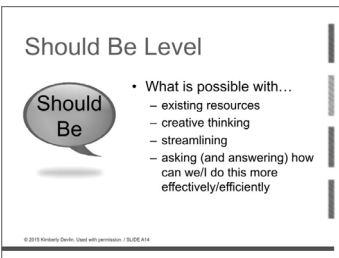
When you tailor these materials to your needs, be sure to carry any changes through all three resources for a seamless facilitation.

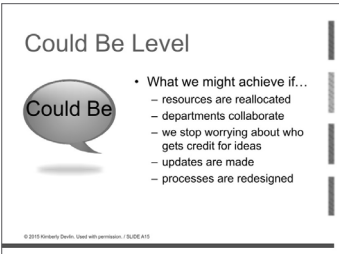
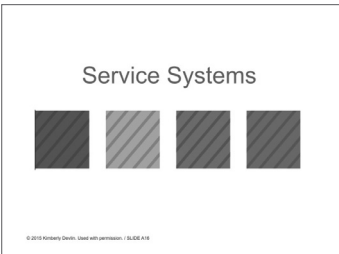
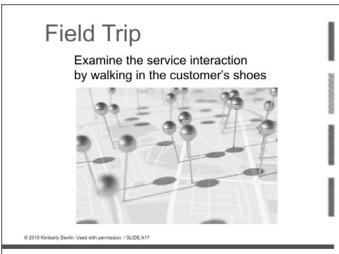
Day One: (9:00 a.m. to 4:30 p.m.)

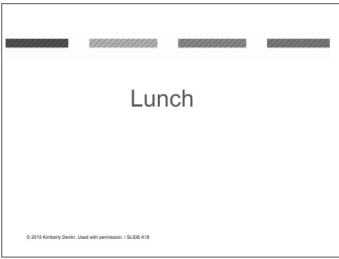
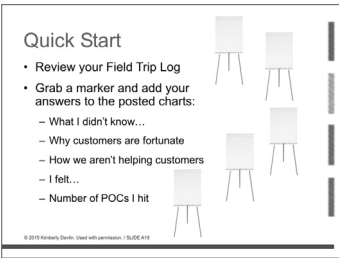
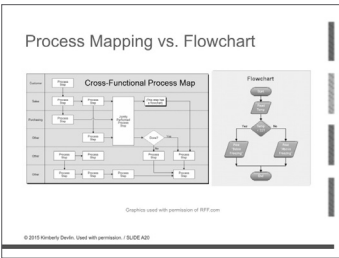
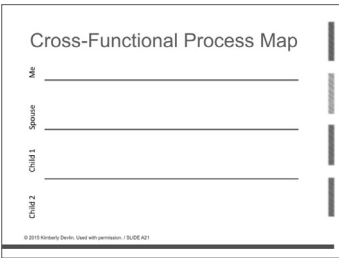
TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
	<p>Slide 1</p> 	<p>Create a Positive Learning Environment</p> <p>Display this opening slide and welcome participants as they arrive.</p>
9:00 a.m. (10 min)	<p>Slide 2</p> 	<p>Welcome/ Learning Activity 26: Wall Graffiti</p> <p>Use this learning activity to create immediate involvement and to draw out the participants' perspectives, <i>not</i> as housekeeping, introductions, or generalized “welcoming” comments (you will do that later in the workshop). Set the tone for the learning event as an active, contributory, and fun experience.</p>
9:10 a.m. (5 min)	<p>Slide 3</p> 	<p>Program Objectives/ Learning Activity 27: Prioritize Learning</p> <ul style="list-style-type: none"> Handout 27: Learning Objectives <p>This individual activity introduces the workshop's learning objectives for both days, encouraging participants to begin engaging with the objectives.</p>
9:15 a.m. (10 min)	<p>Slide 4</p> 	<p>Ground Rules/ Learning Activity 28: Social Agreements</p> <p>Guided by your facilitation, this activity will help participants generate a list of guidelines that will drive their behavior for the two days. During the debrief, reach consensus on how the group will monitor and correct breaches of these agreements (so that you are not placed in the role of sole enforcer).</p>

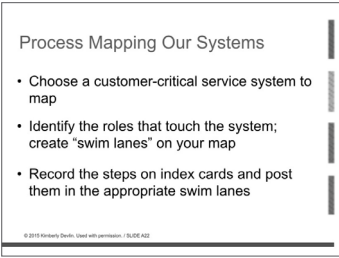
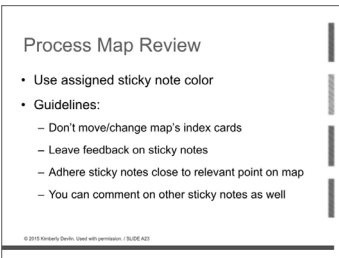
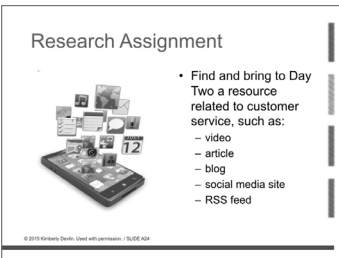
TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
9:25 a.m. (35 min)	Slide 5 	<p>Learning Objective 1/ Learning Activity 29: Now You Know</p> <ul style="list-style-type: none"> • Handout 28: Now You Know <p>Learning Activities 29 and 30 act as icebreakers while supporting the first learning objective—strengthen internal relationships and your awareness of lateral service challenges.</p> <p>Through one-on-one interviews, this large group activity will help participants meet others and develop deeper understandings of one another’s work and how it affects the organization’s ability to deliver customer service. Use the instructions in the learning activity to guide the exercise.</p> <p>To help participants get started, share examples of how you might complete the worksheet statements and sentence stems. Following the debrief, integrate a complete self-introduction, including your experience and expertise with customer service.</p>
10:00 a.m. (25 min)	Slide 6 	<p>Learning Objective 1/ Learning Activity 30: Group Résumé</p> <p>Working in small groups, teams will chart the collective strengths of the members of their group in the form of a wall chart résumé. These will be useful to refer back to at points in the workshop where the groups’ strengths are being drawn upon.</p>
10:25 a.m. (15 min)	Slide 7 	<p>BREAK</p>

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
10:40 a.m. (10 min)	Slide 8 	Learning Objective 2/ Learning Activity 31: Interconnected Service Facets This facilitated discussion supports the second learning objective—distinguish service behaviors from service strategies and service systems. Lead a discussion of the three elements that contribute to the customer’s overall experience, referring to the content in the learning activity. Be sure to use questioning to draw information, ideas, and examples from the participants. Plan to <i>supplement</i> the comments shared by the participants with the content provided for you to avoid turning this into lecture.
10:50 a.m. (20 min)	Slide 9 	Learning Objective 2/ Learning Activity 32: The Root Issue Is? <ul style="list-style-type: none"> • Handout 29: Interconnected Service Facets • Handout 30: The Root Issue Is? This application activity also supports the second learning objective. You will need to customize the handout to the organization or industry. An example is provided to guide you, and sample situations are also included; tailor them to be relevant to your participants. (Slide 1 of 2)
	Slide 10 	Use this slide during the debriefing discussion as a visual support. It will remind participants of the three service facets and guide them in their voting. (Slide 2 of 2)

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
11:10 a.m. (15 min)	Slide 11 	Learning Objective 3/ Learning Activity 33: Performance Improvement Service Levels <ul style="list-style-type: none"> • Handout 31: Performance Improvement <p>This partner talk activity supports the third learning objective—assess the three aspects of your service environment to target improvement opportunities.</p> <p>Direct participants to team up and discuss their interpretations of As Is, Should Be, and Could Be based on the slide image. Lead a large group discussion afterwards to clarify and expand on the partner talk content.</p> <p>(Slide 1 of 5)</p>
	Slide 12 	<p>Use this slide and the learning activity instructions to provide additional context for As Is, Should Be, and Could Be, and as a transition into a large group discussion.</p> <p>(Slide 2 of 5)</p>
	Slide 13 	<p>Begin a large group discussion on As Is, referring to the slide and learning activity for content.</p> <p>(Slide 3 of 5)</p>
	Slide 14 	<p>Continue the large group discussion on Should Be, referring to the slide and learning activity for content.</p> <p>(Slide 4 of 5)</p>

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
	<p>Slide 15</p> 	<p>Wrap up the large group discussion with the Could Be level, referring to the slide and learning activity for content.</p> <p>(Slide 5 of 5)</p>
	<p>Slide 16</p> 	<p>Transition to Service Systems</p> <p>Display this slide to signal the transition from service strategies to service systems.</p>
<p>11:25 a.m. (20 min)</p>	<p>Slide 17</p> 	<p>Learning Objective 3/ Learning Activity 34: Field Trip</p> <ul style="list-style-type: none"> • Handout 32: Field Trip Log • Handout 32b: Virtual Field Trip Map (optional) • Assessment 1: Where Are We Now? (optional) <p>In support of the third learning objective—assess the three aspects of your service environment to target improvement opportunities—ask participants to visit their service delivery environment as a <i>customer</i> and assess and document the customer experience.</p> <p>This activity is scheduled to span the lunch hour plus 45 minutes of workshop time to allow flexibility for varying field trip needs. The field trips will be debriefed after lunch through the quick start activity.</p> <p>Handout 32b and Assessment 1 are optional resources to use with activity variations noted in the learning activity.</p>

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
11:45 a.m. (105 min) NOTE: Includes 45-minute field trip and 60-minute lunch.	Slide 18 	LUNCH (AND FIELD TRIP)
1:30 p.m. (15 min)	Slide 19 	Learning Objective 3/ Learning Activity 35: Quick Start—Field Trip Debrief Use this slide to initiate the self-directed debrief of the field trips as participants return from lunch.
1:45 p.m. (30 min)	Slide 20 	Learning Objective 4/ Learning Activity 36: Working with Cross-Functional Process Mapping This activity supports the fourth learning objective—document a process map for a customer-critical service system. Use this slide to show examples of a flowchart and a cross-functional process map and to help you highlight the differences between the two. (Slide 1 of 2)
	Slide 21 	Working with a generic process, groups will process map the steps involved in a family of four going out to dinner at a restaurant. Display this slide to model how their process map should be set up. (Slide 2 of 2)

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
<p>2:15 p.m. (60-90 min)</p> <p>NOTE: This includes a 15-minute break.</p>	<p>Slide 22</p> 	<p>Learning Objective 4/ Learning Activity 37: Cross-Functional Process Mapping Our Processes</p> <p>Transition the group from the generic process mapping exercise to an organization-specific, customer-critical one.</p> <p>Groups will apply the lessons learned from the mini, generic process map to their selected organization-specific one. Use learning activity notes to guide the exercise.</p>
<p>3:45 p.m. (30 min)</p>	<p>Slide 23</p> 	<p>Learning Objective 4/ Learning Activity 38: Cross-Functional Process Map Reviews</p> <p>Groups will review one another's process maps and revise their maps based on feedback received. Use learning activity notes to guide the activity.</p>
<p>4:15 p.m. (15 min)</p> <p>End at 4:30 p.m.</p>	<p>Slide 24</p> 	<p>Closing/Learning Activity 39: Day-Two Workshop Closure</p> <p>Time has been built into this activity for you to share a simple assignment that will serve as the basis of the quick start activity for the morning of Day Two. It will also gather quick feedback on Day One, preview and potentially revise the agenda for Day Two, set a date for Day Two (if not already established), and devise a group strategy for having all of the output of Day One available on Day Two.</p> <p>Based on your customization and length of time between workshop days, you may also want to capture any additional expectations you have of the participants from now until Day Two.</p>

What to Do Between Workshop Days

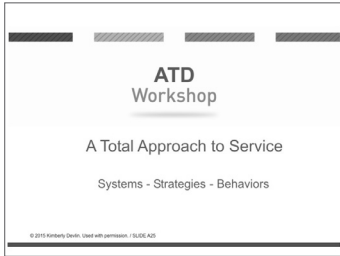

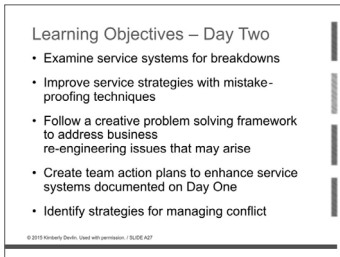
- Follow up on any questions or parking lot issues presented during Day One.
- Note facilitator lessons learned from the first day of the workshop. Adjust materials for Day Two accordingly, if needed.

- Address any equipment, room setup, or other learning environment issues you weren't able to address during the workshop.
- Debrief with your co-facilitator, if applicable.


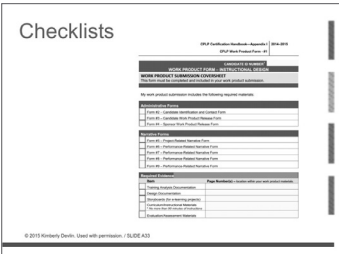

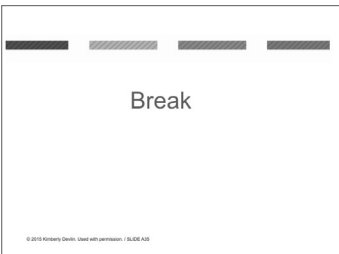
Two-Day Workshop Agenda: Day Two

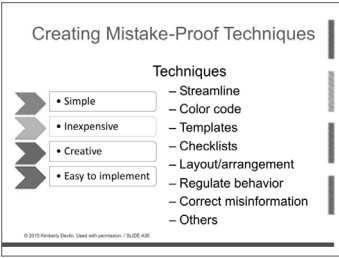

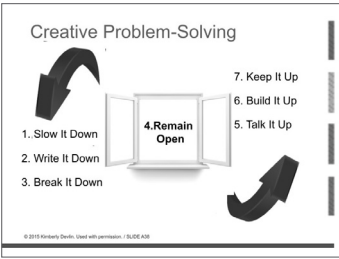
The second day of this workshop is where the greatest fluidity comes into play. Based on the feedback participants shared at the end of Day One, the time available to you between workshop days, and your customization of the workshop design, the following agenda overview may require adjustments and fine tuning.

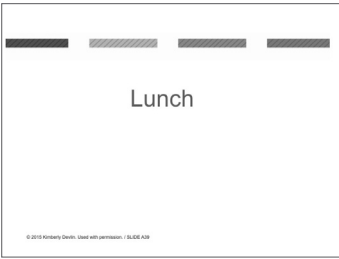
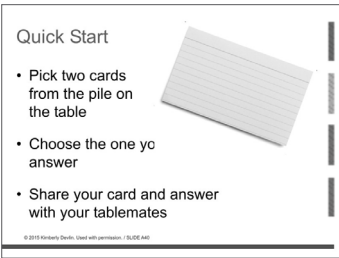

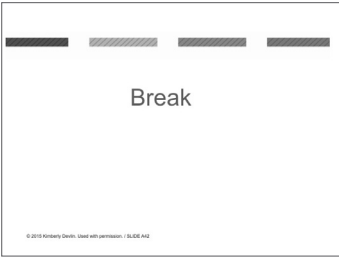
Day Two: (9:00 a.m. to 4:30 p.m.)


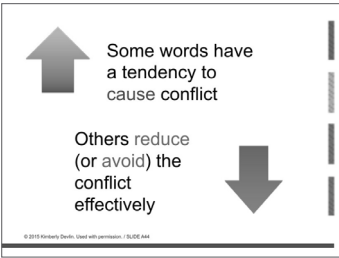
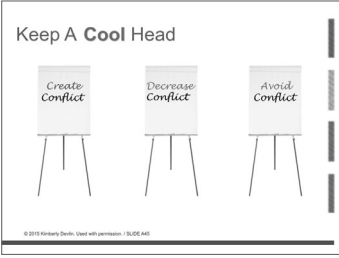
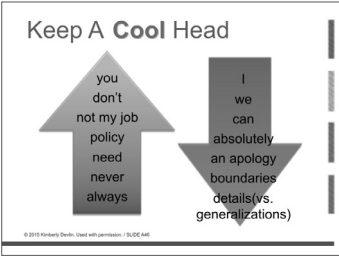
TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
	Slide 25 	Transition to Day Two This slide is primarily intended as an aid for <i>you</i> , to mark the crossover to Day Two, not as a visual support for the participants.
9:00 a.m. (20 min)	Slide 26 	Reconnect/ Learning Activity 40: Welcome Back!—Quick Start Display this slide as participants arrive to engage them in the self-directed workshop opening activity. Welcome participants and individually direct their attention to the quick start if needed. (Slide 1 of 2)
	Slide 27 	Revisit and remind participants of the learning objectives for Day Two. (Slide 2 of 2)

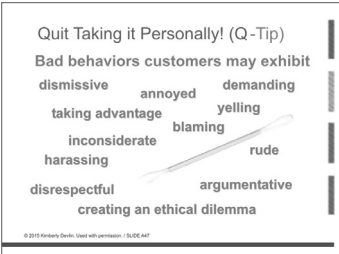
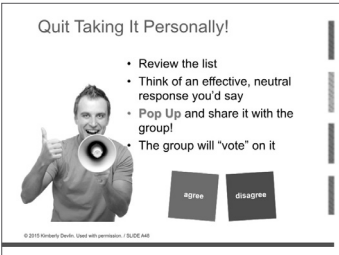
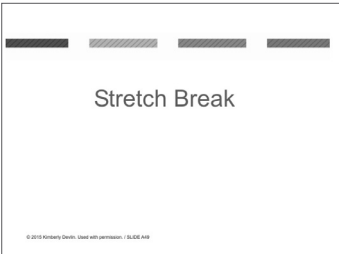
TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
9:20 a.m. (30 min)	Slide 28 	Learning Objective 5/ Learning Activity 41: Control–No Control–Influence (C–NC–I) <p>This activity supports the fifth learning objective—examine the organization’s service systems for breakdowns from the customer’s perspective.</p> <p>Participants will review their process maps to consider where they can exert control or influence over the processes.</p>
	Slide 29 	Transition to Service Strategies <p>Use this slide to signal shift to service strategies.</p>
9:50 a.m. (20 min)	Slide 30 	Learning Objective 6/ Learning Activity 42: Mistake Proofing <ul style="list-style-type: none"> • Handout 33: Mistake Proofing to Improve Customer Service <p>This activity supports the sixth learning objective—improve existing service strategies through mistake-proofing techniques.</p> <p>Use this and the next four slides to draw out the group’s knowledge of mistake proofing. (Slide 1 of 5)</p>
	Slide 31 	<p>Lead the group through a facilitated discussion of the characteristics of mistake proofing. (Slide 2 of 5)</p>

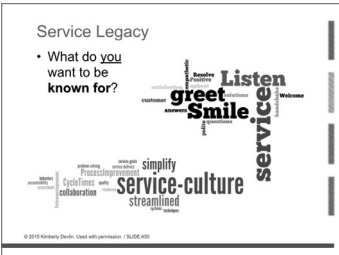

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
	<p>Slide 32</p> 	<p>Solicit their examples of how mistake-proof techniques can be used to support customer service. Supplement discussion with examples from your experience (or from examples provided in learning activity notes). Consider replacing Slides 32-34 with slides depicting organization-specific examples, if applicable.</p> <p>(Slide 3 of 5)</p>
	<p>Slide 33</p> 	<p>Checklists are another example of mistake-proofing techniques. Ask participants to cite an example of their use in their current processes.</p> <p>(Slide 4 of 5)</p>
	<p>Slide 34</p> 	<p>Yet another technique is regulating behavior through design (size/dimension). Other examples include arm rests on bus benches to discourage people from lying down or counter height of courtesy computer stations to limit use time.</p> <p>(Slide 5 of 5)</p>
<p>10:10 a.m. (15 min)</p>	<p>Slide 35</p> 	<p>BREAK</p>

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
10:25 a.m. (30 min)	<p>Slide 36</p> 	<p>Learning Objective 6/ Learning Activity 43: Mistake-Proofing Process Map Elements</p> <ul style="list-style-type: none"> • Handout 34: Mistake-Proofing Process Map Elements <p>This partner activity continues to support the sixth learning objective.</p> <p>Participants partner and use the handout to identify opportunities to mistake proof elements of the process maps and then design mistake-proof techniques to improve the service outcome.</p>
10:55 a.m. (30 min)	<p>Slide 37</p> 	<p>Learning Objective 6/ Learning Activity 44: Critiquing Mistake-Proof Techniques</p> <p>This partner activity also continues to support the sixth learning objective.</p> <p>Working with a new partner, participants receive feedback on their mistake-proof techniques. Once they have received feedback, ask them to return to their original partner and share what they learned and how they enhanced or revised the technique.</p>
11:25 a.m. (35 min)	<p>Slide 38</p> 	<p>Learning Objective 7/ Learning Activity 45: Creative Problem-Solving</p> <ul style="list-style-type: none"> • Handout 35: Seven-Step Creative Problem-Solving Process • Handout 36: Creative Problem-Solving Worksheet <p>This activity supports the seventh learning objective—follow a framework for creative problem-solving to address issues that may arise from business reengineering.</p> <p>Use the slide and Handout 35 to introduce the content of the learning activity. Facilitate a discussion of the model and have participants share their strategies for each step. (NOTE: The customizable presentation slides are animated and allow you to bring in each step one at a time.)</p> <p>Then lead the group into the application portion of the activity, referring to Handout 36 and the list of problems charted during the discussion.</p>

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
12:00 p.m. (60 min)	Slide 39 	LUNCH
1:00 p.m. (15 min)	Slide 40 	Transition to Afternoon/ Learning Activity 46: Quick Start Use this self-directed pulse-check activity to open the afternoon and address any questions or concerns. Set out materials, display the slide, and invite participants to complete the learning activity as they return. After the activity, answer questions from the group and clarify content as needed. Provide an overview of the remaining learning objectives for the afternoon.
1:15 p.m. (45 min)	Slide 41 	Learning Objective 8/ Learning Activity 47: Next Steps to Improve Our Systems <ul style="list-style-type: none"> • Handout 37: Next Steps to Improve Our Systems This activity supports the eighth learning objective—create team action plans to enhance the service systems documented on Day One. You have a great deal of flexibility in how you choose to form the action planning teams. Be sure each team member takes an active role both in documenting the action plan and in the actions committed to in the plan.
2:00 p.m. (15 min)	Slide 42 	BREAK

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
	<p>Slide 43</p> 	<p>Transition to Service Behaviors</p> <p>Use this slide to signal shift in topic to service behaviors.</p>
<p>2:15 p.m. (30 min)</p>	<p>Slide 44</p> 	<p>Learning Objective 9/ Learning Activity 48: Keep a Cool Head</p> <ul style="list-style-type: none"> • Handout 38: Keep a Cool Head <p>This large group activity supports the ninth learning objective—identify strategies for managing conflict.</p> <p>In this activity, participants identify phrases and actions that increase conflict, strategize on how to respond to them to reduce their conflict-causing effects, and list alternative phrases to help avoid conflict.</p> <p>Use the instructions in the learning activity and these three slides to conduct the exercise.</p> <p>(Slide 1 of 3)</p>
	<p>Slide 45</p> 	<p>Use this slide to focus participants' attention during the group discussion.</p> <p>(Slide 2 of 3)</p>
	<p>Slide 46</p> 	<p>Use this slide to encourage participants to compare their ideas to some prepared answers.</p> <p>NOTE: Animation in the customizable slides will provide feedback on participants' interpretation versus the actual alignment with the escalating and deescalating labels. If you are using the free, pdf-version of the presentation slides, the slide will automatically display the aligned positioning shown at left.</p> <p>(Slide 3 of 3)</p>

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
2:45 p.m. (30 min)	<p>Slide 47</p> 	<p>Learning Objective 9/ Learning Activity 49: Quit Taking It Personally (Q-Tip)</p> <ul style="list-style-type: none"> • Handout 39: Quit Taking It Personally (Q-Tip) <p>This pop-up activity also supports the ninth learning objective.</p> <p>Use this slide and the handout to review (briefly) the types of customer behaviors that can trigger an emotional reaction.</p> <p>(Slide 1 of 2)</p>
	<p>Slide 48</p> 	<p>During the pop-up exercise, participants generate neutral and customer-focused responses to sample language customers may say. Colleagues will vote on the effectiveness of the responses shared using colored cards. Use the instructions in the learning activity and this slide to introduce and facilitate the exercise.</p> <p>(Slide 2 of 2)</p>
3:15 p.m. (10 min)	<p>Slide 49</p> 	<p>STRETCH BREAK</p> <p>For this break, stay in the room but invite everyone to stand, stretch, and take a mental break to lead into closing activities.</p> <p>Options to consider include self-directed stretching, a chair-yoga video clip, or asking volunteers to lead the group in their favorite stretch.</p>

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
<p>3:25 p.m. (40 min)</p>	<p>Slide 50</p> 	<p>Personalizing the Learning/ Learning Activity 50: Living My Legacy</p> <ul style="list-style-type: none"> • Handout 40: Living My Legacy Worksheet <p>Take 10 minutes to field comments from participants on what a legacy is and how to plan and live your own desired service legacy. Begin shifting your tone and energy level to lower the intensity of the room's energy level.</p> <p>Establish a quiet learning environment for participants to contemplate and draft their service legacy plans. Allow 30 minutes. Consider adding a guided reflection prior to the handout to shift the energy of the room to one of self-reflection and introspection before they focus on their individual plans. It may also be beneficial to softly play music to establish a tone in the room, as described in a variation in the learning activity.</p>
<p>4:05 p.m. (25 min) End at 4:30 p.m.</p>	<p>Slide 51</p> 	<p>Closing/Learning Activity 51: Day-Two Workshop Closure</p> <ul style="list-style-type: none"> • Handout 41: Course Evaluation—A Total Approach to Service <p>Time has been built in here for you to structure a planned close to the workshop, rather than an abrupt ending. With questioning and other techniques, guide participants through a review of what they learned, their own assessment of what they learned, what they will do with what they learned, and a celebration of their achievements.</p> <p>If the workshop is part of a larger organizational initiative, be sure to share next steps in relation to the overall initiative too.</p> <p>Use the evaluation instrument to gather feedback on the workshop. Collect completed course evaluations. Distribute certificates (if provided).</p>

What to Do Next

- Review Chapter 10 and create your workshop support plan:
 - Select the most effective pre- and post-workshop communication strategies.
 - Involve participants' managers early on.
 - Choose the follow-up coaching strategies that most efficiently align with your workshop rollout.
- Manage workshop logistics:
 - Identify appropriate participants.
 - Schedule the workshop dates, reserve an appropriate location, and invite participants.
 - Inform participants about any pre-work, if you are adding it to the workshop.
 - Prepare copies of the participant handouts (refer to Chapter 14 for information about how to access and use the supplemental materials provided for this workshop).
 - Coordinate catering, if being provided.
- Prepare yourself for the workshop:
 - Review the workshop objectives, learning activities, and handouts to plan the content you will use.
 - Confirm that you have addressed scheduling and personal concerns so that you can be fully present to facilitate the class.
 - Set an out-of-office email auto response for both days of the workshop.
- Pack your bag:
 - Gather the workshop essentials: participant materials, slide show file, facilitator notes (learning activity pages in Chapter 11), and any activity materials noted in the learning activities (customized manipulatives, index cards, envelopes, or others).
 - Coordinate or bring audio-visual equipment: laptop, projector, speakers, and remote control for presentation slides.
 - Pack training room basics: markers, tape, easels, flip charts, and tactile items, such as Koosh balls, Play-Doh, or others, to place on the tables for tactile learners.
 - See Chapter 8 for other ideas to enhance the learning environment of your workshop.

Buy This Book