

Customer Service Training for PJ Enterprises



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Instructor Information

Background Information

PJ Enterprises Goals for 2016

Building on last year's success, PJ Enterprises has ambitious goals this year. As an organization we hope to:

- Grow aggressively to meet or exceed our financial targets
- Improve our customer-service scores by 10%
- Improve the experience of working for PJ Enterprises for everyone

Telephone Customer Service is Key

Providing a quality, personalized experience is what sets PJ Enterprises apart from our competitors. Standardizing that experience across all our customers' interactions lays the foundation for our success in every other area of the organization. As the first human point of contact for customers, Telephone Operators (TOs) have the power to make or break customers' experience. Maintaining a standard, high-quality experience throughout a call, even when customers have challenging situations, allows Customer Service Supervisors (CSSs) to turn problems into opportunities to impress.

Here are just a few of the ways the skills from this training will help grow our business:

- Completing calls faster while increasing customer satisfaction expands our sales opportunities.
- Improving the quality of service encourages customers to return and recommend us to others.
- Suggesting additional services and products increases sales without adding to call volume.

Training Objectives

At the end of this program TOs and CSSs will

- Provide personalized customer service that meets standardized expectations.
- Use the new electronic product guide to find requested information in less than a minute
- Use upselling and cross selling techniques that engage customers
- Increase the number of customer problems they solve at the first point of contact by 10%

Training Overview

The course is designed to support TOs and CSSs in developing and refining key skills for handling customer sales and service requests in a courteous, accurate and efficient manner. We will conduct training in three sessions delivered over the course of two weeks. This allows learners time to practice applying skills on their own; giving them time to build confidence in foundational skills before adding the next set of tools. The table below provides a high-level description of the sessions and their topics.

Session 1 3 hours	Introduction
	Basic Ingredients of a Successful Call <i>Practice using optimized structure and tone to meet customers' needs.</i>
Session 2 3 hours	Tools for Building Satisfaction <i>Explore the tools and principles that take a call from good to great.</i>
	Upselling and Cross-selling <i>Practice techniques for increasing sales with customers on the line.</i>
Session 3 2 hours	Problem solving <i>Prepare to handle challenging calls by applying simple principles.</i>
	Training Conclusion

Audience Information

Our TOs and CSSs are women who range from 18 to 60 years in age. All of them have completed high school or earned a GED. They have a variety of experience in providing customer service. For some, this is their first job; others are seasoned experts who've been promoted for demonstrating great sales and service skills. As instructors, it is important to remember we are working with adults who bring a wealth of personal and professional experience to this training. The activities are designed to motivate learners to share their expertise with each other and connect these new skills and ideas with their pre-existing knowledge.

Annotated Agenda

<i>Approx. Time</i>	<i>Topics and Activities</i>	<i>Slides and Materials</i>
3hr	Session 1	
20min	Lesson I: Course Introduction <ol style="list-style-type: none"> Admin and Introductions Purpose Objectives Agenda 	Slides #1-12 Inst. Computer Projector Student guides Extra pens Name cards
2hr & 45min 5 30 40 30 45 15	Lesson II: Basic Ingredients of Successful Calls <ol style="list-style-type: none"> Lesson Introduction Developing an appropriate greeting and introduction <ol style="list-style-type: none"> Overview of basic elements Write a greeting and introduction Share with partner for feedback Report-out and Summary Following basic chat flow <ol style="list-style-type: none"> Overview of the chat flow principles Review audio examples and discussion Group activity- ordering phrases in chat flow Report out and Summary Closing a call <ol style="list-style-type: none"> Overview of basic elements Write a closing Share with partner for feedback Report out and Summary You are the key ingredient; using tone, pace, and volume <ol style="list-style-type: none"> Overview the impact of non-verbal signals Demonstrate examples and counter examples Review audio examples for tone, pace, and volume Scripted practice role-play Lesson summary <ol style="list-style-type: none"> Review topics Develop practice plans 	Slides #?-? Inst. Computer Projector Speakers Flip chart Markers Chat phrase cards Call recordings Scenario scripts Practice Plan Sheets

<i>Approx. Time</i>	<i>Topics and Activities</i>	<i>Slides and Materials</i>
3hr	Session 2	
<i>2hr & 10min</i>	Lesson III: Tools for Building Satisfaction	Slides #?-?
5	1. Lesson Introduction	Inst. Computer Projector
35	2. Finding products quickly in the new product guide <ul style="list-style-type: none"> a. Overview of product guide b. Searching by product number c. Searching by keyword/descriptor d. Searching by clickable Table of Contents e. Practice Calls 	Lab computers Speakers Student Guides Flip chart Markers
10	3. Using acknowledgement <ul style="list-style-type: none"> a. Overview of appropriate phrases b. Practice responding with acknowledgement c. Review audio example for acknowledgement opportunities d. Transition 	Call recordings Scenario scripts Practice plan sheets
35	4. Using open-ended questions to drive the conversation <ul style="list-style-type: none"> a. Overview of Strategies b. Review audio examples and discussion c. Group practice scenarios d. Transition 	
35	5. Using active listening strategies for success <ul style="list-style-type: none"> a. Overview of Strategies b. Discussion of audio examples c. Close method script- trainees fill in responses that demonstrate methods d. Summary 	
10	6. Lesson Review and Summary <ul style="list-style-type: none"> a. Review topics b. Develop practice plans 	

<i>Approx. Time</i>	<i>Topics and Activities</i>	<i>Slides and Materials</i>
Session 2 Continued		
<i>50min</i>	Lesson IV: Upselling and Cross-selling	Slides #-?
<i>5</i>	1. Lesson Introduction	Inst. Computer
<i>15</i>	2. Overview of sales strategies	Projector
	a. Product of the week,	Lab computers
	b. Related products,	Speakers
	c. Sale/promotion,	Flip chart
	d. Catalog referral	Markers
<i>15</i>	3. Using the product reference for sales strategy information-	Call recordings
	a. Overview demonstration	Scenario scripts
	b. Directed follow-along practice	Practice plan sheets
	c. Independent practice and worksheet	
<i>10</i>	4. Group brainstorm of where to ask in the call	
	a. Overview-Group discussion-When does the upsell/cross-sell opportunity pass?	
	b. Authentic upselling and cross-selling audio examples/discussion	
<i>5</i>	5. Lesson Summary	
	a. Review topics	
	b. Develop practice plans	
<i>2hr</i>	Session 3	
<i>1hr 35min</i>	Lesson V: Problem Solving and Review	Slides #-?
<i>5</i>	1. Lesson Introduction	Inst. Computer
<i>50</i>	2. De-escalating upset customers	Projector
	a. Introduction to CARP	Speakers
	b. Practice strategies	Student Guides
	c. Summary	Flip chart
<i>20</i>	3. Implementing “I don’t know” alternatives	Markers
	a. Overview of strategies	Call recordings
	b. Exercise-Audio scenarios and discussion	Scenario scripts
	c. Summary	Practice Plan Sheets
<i>20</i>	4. Full Training Review	Call Quality Rubric
Session 3 Continued		
<i>25min</i>	Training Conclusion	Call Quality Rubric

<i>Approx. Time</i>	<i>Topics and Activities</i>	<i>Slides and Materials</i>
15	1. Assessment Logistics <ul style="list-style-type: none"> a. Overview b. Answer questions a. Sign-up for observations and feedback 	
10	2. Celebrate	

Preparation Checklist

Use these lists to help you prepare for the sessions.

Several days before the first session:

- ☐ Review the facilitator guide, be familiar with the content and make presentation notes as needed.
- ☐ Review the PowerPoint file; be familiar with the content and any slide animations.
- ☐ Practice opening and searching in the electronic product guide while the PowerPoint file is also open.
- ☐ Play through sample calls; make notes in the instructor guide as needed.
- ☐ Start to gather supplies
- ☐ Find out whom to contact should you need technical assistance on the day of the session.

The day of each session:

- ☐ Gather and prepare the materials needed for the session:

- Instructor computer and files
 - Extra pens
 - Flip chart
 - Markers
 - Student guides
 - Scenario scripts
 - Chat phrase cards (Session 1)
 - Practice Plan Sheets
- ☐ Arrive at the training room 30 minutes early to prepare the room.
- Make sure all equipment is set up and functional.
 - Place a student guide (and name card if needed) at each seat.
 - Open the PowerPoint to the first slide of the session

Class Overview

Time: 20 min.

Instructor Notes

Welcome: the students to the training course.

Tell: them that this course is part of a new customer service training that PJ Enterprises is initiating and that are excited to have them be a part.

Student Guide Content



Welcome

Welcome to the Customer Service training! PJ Enterprises is initiating a new training format for all telephone operators, and we are excited you are a part of this course.



Welcome to
Customer Service Training
For PJ Enterprises

Go over: the administrative details

Explain: that this session of the course will be three hours long and there is no scheduled break.

Please feel free to take a quick break as needed during the session.

Remind: them to take nametag in the back of the room and make one for themselves.

Welcome the participants to feel free to ask questions at any time during the training.



Administrative Details

Be sure to fill out a nametag available on the table in the back.

There is no scheduled break in this 3-hour session. However, please feel free to take a momentary break as needed during the training sessions.

We encourage you to ask questions throughout the course at any time.



Administrative Details

- Nametags
- Questions during the course

Introduce: yourself, giving your name and position at PJ Enterprises, years and type of experience. Tell them a little about yourself and what you enjoy doing in your free time.

Tell: participants to introduce themselves giving the information on the slide



Introductions

Your instructors will introduce themselves and after you will introduce yourself giving the following information:

- Your name
- Your background and experience
- Your favorite activity on your time off



Introductions

- Instructors
- Participants
 - Name
 - Background and experience
 - Favorite activity in your time off?



Explain: Telephone Operators are the first point of contact and have the power to make or break customers' experience.

Tell: them that the purpose of the course is to provide them the knowledge and skills in order for them to do their job expertly and in so doing support the PJ's mission and ensure profitability for the company.

Read: the company's mission:

PJ Enterprises will provide customer satisfaction through excellent and knowledgeable customer service intended to help offer customers the most unique products in the marketplace.



Purpose of Training

The purpose of this training is to:

- Provide you the knowledge and skills in order to do your job expertly
- Help you support the company's mission

PJ Enterprises will provide customer satisfaction through excellent and knowledgeable customer service intended to help offer customers the most unique products in the marketplace.



Purpose of Training

- Provide you the knowledge and skills to do your job expertly
- Help you support the company mission

PJ Enterprises will provide customer satisfaction through excellent and knowledgeable customer service intended to help offer customers the most unique products in the marketplace.

Tell: them that we assume that they all have had prior call center at PJ Enterprises experience involving customer service, processing orders, using the computer system and searching the product reference guide.

They will use this foundation to further develop their skills and learn the performance standards for quality service needed to master this training and excel in their work.



Pre-requisites of Training

We expect that all participants have had prior call center experience at PJ Enterprises involving customer service, processing orders, using the computer system and searching the product reference guide.

Your previous experience is the foundation for further developing your skills and learning the performance standards for quality service needed to master this training and excel at PJ Enterprises.



Course Pre-requisites

- ◆ Call center experience at PJ Enterprises
 - Customer service
 - Computer system
 - Order processing
 - Product reference searches

Go over: the course objectives.

Tell: them this training is designed to support them in developing and refining skills for handling customer sales and service requests in a courteous, accurate and efficient manner.

Lessons will target four key objectives. At the end of the training participants will be able to:

- Provide personalized customer service that meets standardized expectations
- Use the new electronic product guide to find requested information quickly
- Use upselling and cross selling techniques that engage customers and drive sales
- Improve their ability to solve customer problems



Course Objectives

In this course you will learn how to:

- Provide personalized customer service that meets standardized expectations
- Use the new electronic product guide to find requested information quickly
- Use upselling and cross selling techniques that engage customers and drive sales
- Improve your ability to solve customer problems



Course Objectives

In this course you will learn how to:

- Provide personalized customer service that meets standardized expectations
- Use the new electronic product guide to find requested information quickly
- Use upselling and cross selling techniques that engage customers and drive sales
- Improve your ability to solve customer problems

Tell: them that at the end of the final session, they will get an opportunity to practice the skills they have learned over the course of the training on a live call. Their performance will be evaluated based on the standards defined on the Call Quality Rubric – standards that they have been learning and practicing throughout the course.



Course Outcome

At the end of this 8-hour training you will get an opportunity to practice the skills and techniques you have learned on a live call. You will be evaluated based on the standards defined on the Call Quality Rubric.



Course Outcome

At the end of final session:

- Practice new skills and techniques on a live call
- Performance evaluation based on Call Quality Rubric

Tell: them that the course is divided into in three sessions delivered over the course of two weeks. The training is total of 8 hours and will be divided into two 3-hour sessions and one final 2-hour session.

Go over: the basic agenda:

- ❖ Session 1 - 3 hours
 - Introduction
 - Basic Ingredients of a Successful Call
- ❖ Session 2 – 3 hours
 - Tools for Building Satisfaction
 - Upselling and Cross-selling
- ❖ Session 3 – 2 hours
 - Problem Solving
 - Live Call Performance Evaluation



Organization of Training & Duration

The 8-hour training is divided into in three sessions delivered over the course of two weeks. There will be two 3-hour sessions and one final 2-hour session.



Course Organization

The course is divided into 3 sessions:

Session 1 – 3 hours	Introduction
	Basic Ingredients of a Successful Call
Session 2 – 3 hours	Tools for Building Satisfaction
	Upselling and Cross-selling
Session 3 – 2 hours	Problem solving
	Live call Performance Evaluation

Content Introduction (3 slides)

Explain: The course is designed to support help learners develop and refine key skills for handling customer sales and service requests in a courteous, accurate and efficient manner.

Over the course of the training they will have time to practice applying skills on their own and build confidence in basic skills before adding complexity.

This course outline details to topic in each of the 3 sessions:

• Session 1

- ◆ Lesson I. Introduction
- ◆ Lesson II. Basic Ingredients of Successful Calls
 - Appropriate greetings
 - Basic chat flow
 - Closing a call
 - It's about YOU! Tone, pace, and volume

• Session 2

- ◆ Lesson III. Tools for building customer satisfaction
 - Find products information fast
 - Acknowledgement phrases
 - Drive the conversation
 - Active listening
- ◆ Lesson IV. Upselling/Cross-selling
 - Sales strategies
 - Using the product guide

• Session 3

- ◆ Lesson V. Problem Solving
 - De-escalating upset customers
 - Alternatives to "I don't know"
- ◆ *Final Assessment*
 - Quality Call Practice



Content Introduction

This course is designed to support you develop and refine skills for handling customer sales and service requests in a courteous, accurate and efficient manner.

Over the course of the training you will have time to practice applying skills on your own and build confidence in basic skills before adding on.

This course outline details to topic in each of the 3 sessions:

Content Introduction

Session 1:

- ◆ Lesson I. Introduction
- ◆ Lesson II. Basic Ingredients of Successful Calls
 - Appropriate greetings
 - Basic chat flow
 - Closing a call
 - It's about YOU! Tone, pace, and volume

Content Introduction

Session 2:

- ◆ Lesson III. Tools for building customer satisfaction
 - Find products information fast
 - Acknowledgement phrases
 - Drive the conversation
 - Active listening
- ◆ Lesson IV. Upselling/Cross-selling
 - Sales strategies
 - Using the product guide

Content Introduction

Session 3:

- ◆ Lesson V. Productive Problem Solving
 - De-escalating upset customers
 - Alternatives to "I don't know"
- ◆ Final Assessment
 - Quality Call Practice

Ask: What questions do you have?



Questions

What questions do you have before we move on?



Questions?

What questions do you have so far?



Lesson III: Tools for Building Satisfaction

Introduction

Time: 5 min.

Connect: the lesson with previous learning and introduce new content.



Introduction

In session one, you learned how to use customer service strategies to obtain information from customers and promote customer satisfaction. We will start today off by discussing strategies to obtain the information needed to answer customer product questions you will encounter during orders.



Lesson 2: Using the Catalog Product Guide



Tell: the course background.

Overview

Based on employee feedback and business need, PJ Enterprise's has developed a searchable, electronic product guide for your reference during calls. This product guide will replace the paper-based reference.

Motivate: students by explaining the relevancy and utility value of the new material.

Importance

The new electronic product guide will allow you to:

- Access information quickly and efficiently.
- Take more customer calls and have more opportunity to improve sales and customer service metrics.
- Reduce job stress by using the customer service and product guide strategies to provide quality service and reduce customer complaints.



Why is this Important?

The new electronic product guide will allow you to:

- Access information quickly and efficiently.
- Take more customer calls and have more opportunity to improve sales and customer service metrics.
- Reduce job stress by using the customer service and product guide strategies to provide quality service and reduce customer complaints.

Explain: what students will learn using common language.



Objectives

In this lesson, you'll:

- Navigate directly to a product using the product number.
- Navigate directly to a product using key words and descriptions
- Navigate to product pages using the product guide Table of Contents.
- Identify when to use each of these strategies based on information provided by the customer.



Objectives

In this lesson, you'll:

- Navigate directly to a product using the product number.
- Navigate directly to a product using key words and descriptions.
- Navigate to product pages using the product guide index.
- Identify when to use each of these strategies based on information provided by the customer.



Topics

This lesson includes the following topics:

Topic		Page
1	Searching the Product Guide by product number.	
2	Searching the Product Guide by keywords/descriptors	
3	Searching the Product Guide by Table of Contents	
4	Identify when to use each of these strategies based on information provided by the customer.	

Searching the Product Guide by Product Number

Time: 10 min.

Tell: the procedure for searching by product number

Emphasize: to always ask the customer for a product number first. Searching by product number will bring up the most accurate and timely response.

Explain: Chunking means breaking a larger number into smaller parts so it's easier to check/retain

Example:

8603202N

860 320 2N

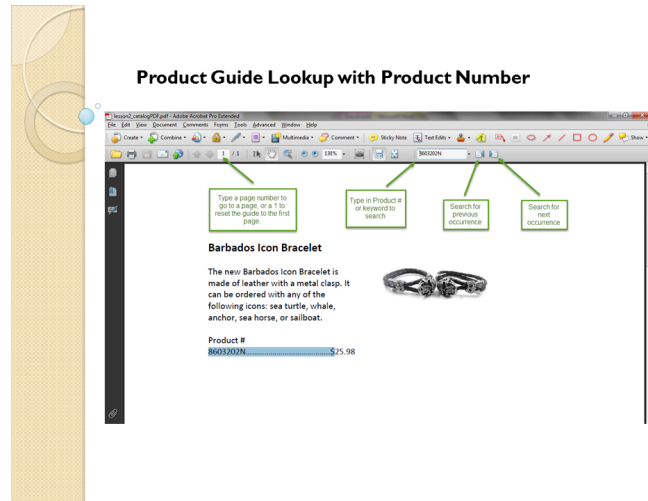
Emphasize: Resetting the product guide to the first page ensures all search results for the next search are given. If it is not reset, only the search results after the current page will be given.

Searching by Product Number - Overview

The fastest and most accurate way to find a product in the Product Reference Guide is to use the product number.

Procedure to search by product number:

1. Press Ctrl F to bring up a search dialog box
2. Ask the customer for product number/repeat a “chunked number for accuracy”
3. Enter the product number into the search dialog box.
4. Click on the Next button to search.
5. The product number will be highlighted if found.
6. Reset the product reference for the next search by typing a 1 into the page number box and pressing Enter to return to the first page.



Demo: the procedure using this scenario, your computer, and the projector.

Example Steps:

1. Press ctrl-F to bring up the search dialog box.
2. Ask the customer for the product number.
3. Enter the product number in the search dialog box.
4. Click on the Next button.
5. Ensure you have the correct product.
6. Find the information requested in the product description.
7. Enter a 1 in the page number box.
8. Press the Enter key to reset the Guide to the first page.

Model: using only essential keywords or shorter keywords to obtain results.

Example: ruffle dress vs. Whitney Sleeveless Ruffle Dress

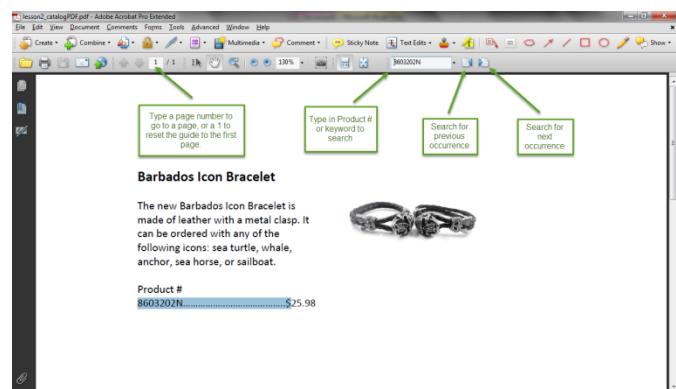
Including too much detail will bring up too many results.

Product Look-up with Product Number: Demonstration

Scenario:

Product Number Given- 8603202N

Hi! I would like to order the Barbados Icon Bracelet.
Could you tell me about the styles and colors you have available?



Searching the Product Guide by Key Word/Description

Time: 10 min.

Tell: the procedure for searching by key word/description.

Emphasize: the more unique the keyword or description, the narrower the search results.

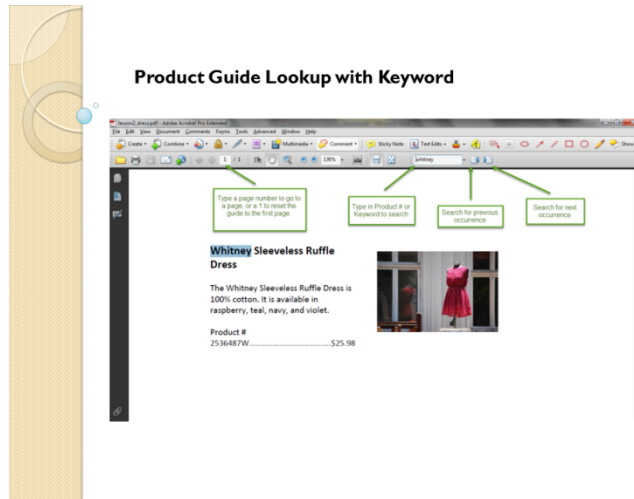
Emphasize: Resetting the product guide to the first page ensures all search results for the next search are given. If it is not reset, only the search results after the current page will be given.

Searching by Keyword or Description Overview

If the customer does not have a product number, you can use a key word or part of a product description to locate the product.

Procedure to search by key word/description:

1. Press Ctrl F to bring up a search dialog box.
2. Enter a key word or partial description into the search dialog box.
3. Use the next and previous buttons as necessary to navigate through results.
4. Reset the product reference for the next question/next call by typing a 1 into the page number box and pressing Enter to return to the first page.



Demo: the procedure using this scenario, your computer, and the projector.

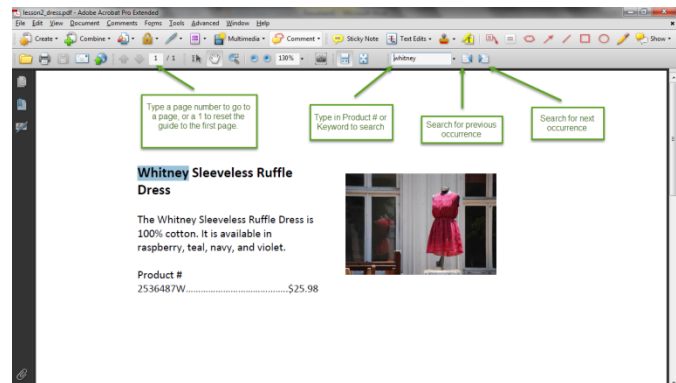
Procedure Steps:

1. Press ctrl-F to bring up the search dialog box.
2. Enter the key word or descriptor in the search dialog box.
3. Click on the Next button.
4. Ensure you have the correct product.
5. Find the information requested in the product description.
6. Enter a 1 in the page number box.
7. Press the Enter key to reset the Guide to the first page.

**Searching by Key Word or Description:
Demonstration**

No Product Number-

Good Afternoon! I'm thinking about ordering the Whitney Sleeveless Ruffle Dress with Black Clover Lattice. Could you tell me about the fabric?



Direct: students to the scavenger hunt on the next page of the guide. Learners will search for 5 products at their workstations.

Move: through the room and provide feedback and assistance

Answer Key:

1. a. Product #
b. approximately 34 1/2" from shoulder to hem
2. a. Football Mat
b. solid velour
3. a. Product #
b. Metal
4. a. Tropicali
b. Rope
5. a. Product #
b. 31"

Review: a couple examples as a class. Have students use the instructor computer to demonstrate on the screen.

**Time for a Scavenger Hunt.
Let's have some fun!**



Keyword Search Scavenger Hunt

- Turn the page for the Keyword Search Scavenger Hunt
- Practice using the Search box to help answer the customers' questions.

Product Guide Keyword Search Scavenger Hunt

For the questions below, use the search function of the electronic product guide to help you answer the caller's questions. Record what you entered in the search box and the answer to the caller's question.

1. Hi! I'm thinking about ordering the Courtney Essentials Dress. Can you tell me the length? Looks like the product number is 8503122BK-S
 - a. What did you enter in the search? _____
 - b. What is the answer to the caller's question? _____
2. Good Afternoon! I'm thinking about ordering the Football Playmat. Can you tell about the fabric? I want to make sure it's soft and comfortable.
 - a. What did you enter in the search? _____
 - b. What is the answer to the caller's question? _____
3. Hi! I'm thinking about ordering the Fleur De Lis Canister set. What material are the handles made from? Product number? Ummmmm 150093.
 - a. What did you enter in the search? _____
 - b. What is the answer to the caller's question? _____
4. Hi! I'm thinking about ordering the Tropicali Sarong-Along. Can you tell me the dimensions? I want to make sure it's practical.
 - a. What did you enter in the search? _____
 - b. What is the answer to the caller's question? _____
5. Hi! I'm very interested in the Ashlynn Pant. I want to make sure they're long enough. Can you tell me how long the inseam is on a size small? I think the number is 8503122BK-S
 - a. What did you enter in the search? _____
 - b. What is the answer to the caller's question? _____

Searching the Product Guide Using the Clickable Table of Contents

Time: 15 min.

Instructor Notes

Tell: the procedure for searching using the Table of Contents.

Using the Table of Contents

You can also use the Table of Contents located on the home page of the Product Reference Guide.

Procedure to use the Table of Contents:

1. Click on the most-related major category to expand that part of the Table of Contents.
2. Click on an appropriate sub-category. This will take you to that section of the product guide.
3. Scroll through the section to find the closest match.
4. Some sub-categories have an additional level to select as well.



Searching the Product Guide by Clickable Table of Contents

- Click on the most-related major category to expand that part of the Table of Contents.
- Click on an appropriate sub-category. This will take you to that section of the product guide.
- Scroll through the section to find the closest match.
- Some sub-categories have an additional level to select as well.

Demo: the procedure using these scenarios, your computer, and the projector.

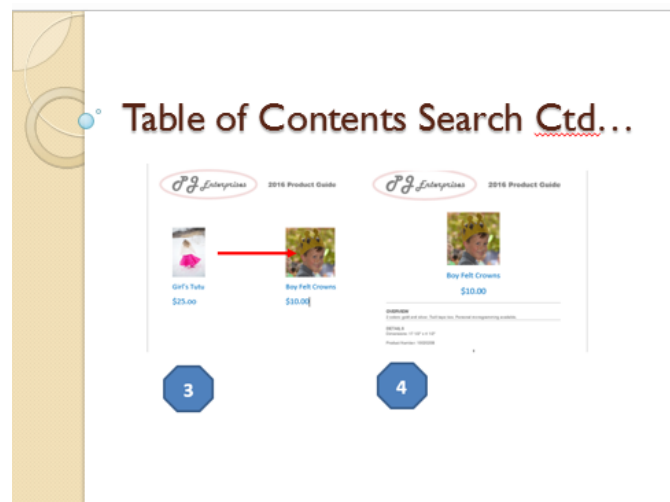
Elicit: responses from learners regarding steps in the procedure. Animate arrows in as students answer.

Procedure for Scenario 1:

1. Choose a relevant Major category: Sale
2. Click on the hyperlinked text for Sale (view will move to the Sale section heading)
3. Under the Sale heading, choose a relevant Subcategory: Kids
4. Click on the hyperlinked text for Kids (view will move to the Kids sub section)
5. Scroll and browse for a relevant product.
6. Recommended Product: Boy Felt Crowns (ID: 1002020B)

Searching by the Table of Contents Demonstration:

I'm looking for a gift for my four-year-old grandson. He's really into castles and knights. I'm a frugal shopper, so I'd love to find something on sale.



Procedure for Scenario 2:

1. Choose a relevant Major category: Living
2. Click on the hyperlinked text for Living (view will move to the Living section heading)
3. Under the Living heading, choose a relevant Subcategory: Serving/Entertaining
4. Click on the hyperlinked text for Serving/Entertaining (view will move to the Serving/Entertaining sub section)
5. This sub section has another layer of headings. Choose and click on a relevant Sub-Sub-Section: Bowls
6. Scroll and browse for a relevant product.

Recommend Product: Sea Party
Tubs (ID: 4865023A)

I'm going to a party at my friend's beach house and want to bring a hostess gift that she'll be able to use at future parties. Maybe something more attractive than the igloo cooler to serve the ciders in? Preferably under \$60.

Table of Contents Search Ex. 2



Table of Contents Search Ex. 2 ctd...



Table of Contents Search Ex. 2 ctd...



Direct learners to the Table of Contents Scavenger Hunt on the next page of the guide. Learners to search for 4 example products at their workstations.

Move: through the room and provide feedback and assistance

Answer Key:

1. a. Kids, Birthday, Girls
b. Zebra fur coat
2. a. Living, Lodge
b. Jute Log Carrier
3. a. Accessories, Hair
b. Headband Bracelets
4. a. Kids, Monogram
b. Gray blanket

Review: a couple examples as a class. Have students use the computer to demonstrate on the screen.

Ask: if someone solved an example a different way. There may be multiple right answers.

Time for Another Scavenger Hunt.

Remember, since the callers don't know exactly what they want, there may be more than one right answer.



Index Search Scavenger Hunt

- Find the Index Search Scavenger Hunt in the appendix
- Use the clickable table of contents in the Product Guide to help the customers find a good product.
- There may be more than one right answer!

Product Guide Table of Contents Search Scavenger Hunt

For the questions below, use the clickable table of contents in the electronic product guide to help you answer the caller's questions. Record what categories you used and the answer to the caller's question. There might be more than one right answer to these questions.

1. I'm going to my niece's birthday party and want something fun and girly, but her mom hates pink.

a. What categories did you click? Main: _____
Sub: _____
Sub: _____

b. What product would you suggest? _____

2. Housewarming present for friends who just bought a rustic cabin. Maybe something for the wood stove?

a. What categories did you click? Main: _____
Sub: _____

b. What product would you suggest? _____

3. I want my daughter to grow her hair out. I thought maybe I could get her some fun and versatile accessories to make it more appealing.

a. What categories did you click? Main: _____
Sub: _____

b. What product would you suggest? _____

4. My brother is expecting twins next spring and I want to get them matching snugglies with their names on them. Do you have anything in a non-gendered color?

a. What categories did you click? Main: _____
Sub: _____

b. What product would you suggest? _____

Group 3-4 TOs with a CSS for authentic, role-play practice.

Direct each CSS to serve as the caller and give each TO in the group one of these starter scenarios on the next page.

Remind TOs to make use of the skills covered in previous lessons and watch for others doing the same.

Directions to CSSs: Using the prompts below, role-play as a customer for a Telephone Operator. Make up reasonable answers to any subsequent questions they ask. Use a different prompt for each Telephone Operator in your group.

Directions to TOs:

Taking the call: Use the “Basic Ingredients” we covered in the last session in combination with the product guide search procedures to help you recommend the best product for your caller.

Observing calls: Watch and listen for your group mates applying the “Basic Ingredients” and using the product guide search function well. Be prepared to name at least one thing each group mate did well.

Call Practice Scenarios



Using the Product Guide on Practice Calls

- Break into groups with 1 CSS and 3 TOs
- CSSs will play the caller using the starting scenarios in the student guide.
- Each TO will complete one call and observe two others.
- Remember to apply all the skills you’ve learned so far.

The product names and categorization were adapted from the website listed in the recommended reading section at the end of this document.

Scenarios for Using the Product Guide:

Directions for Customer Service Supervisors: Using the prompts below, role-play as a customer for a Telephone Operator. Make up reasonable answers to any subsequent questions they ask. Use a different prompt for each Telephone Operator in your group.

1. My wife says she wants a new tote bag; can you help me pick one out?
2. What do you have in the way of pajamas for women?
3. I want to get something for my friends who just got married. Jen likes turtles and Sarah likes cheese.
4. I need to decorate a dinner table, what kinds of unique accessories do you have?
5. My friend from water aerobics showed up with this totally adorable cover-up today. She said she ordered it from your catalog, but I can't find it. It was pink with orange crocheted trim on the sleeves and down the center. Do you still have those? Do they come in extra-large?

Directions for Telephone Operators:

Taking the call: Use the "Basic Ingredients" we covered in the last session in combination with the product guide search procedures to help you recommend the best product for your caller.

Observing calls: Watch and listen for your group mates applying the "Basic Ingredients" and using the product guide search function well. Be prepared to name at least one thing each group mate did well.

Lesson V: Problem Solving and Review

Time: 50 min.

Introduction

Tell: them that now that they know the basics of customer service, it's time to address what to do when customer is angry and requests to speak to a supervisor.

Tell: them that they will start with strategies for de-escalating calls with angry and unsatisfied customers.



Introduction

Now that you know the basic ingredients of a successful call and have developed tools for building satisfaction with you customers, we will now share some strategies for how to work with customer who are unsatisfied and angry.



Lesson 5: Problem Solving and Review



Explain: that they strategies they will learn today will help them improve their metrics as well as reduce the amount of transfers to supervisors.

Remind: them that they are the first point of contact for the customers. Their interactions will make a big difference in the customers' perception of the company. Customer satisfaction is completely in their control.

Importance

In any customer service job, representatives will encounter unsatisfied customers. It's just the nature of the job. How telephone operators handle these types of calls will determine whether the customers repeat their business or find a new organization to patronize.

Knowing strategies for problem solving and de-escalation can add to a telephone operator's overall job satisfaction as well.

Introduction (cont'd)

Go over: the topics in the lesson and explain that they will complete a culminating activity where they will apply all the strategies from Lessons 1-5, as well as lessons from Sessions 1-2.



Overview

In this lesson, the learners will adopt strategies to de-escalate upset customers. They will use the acronym CARP to help them with the steps that will turn a customer's negative experience into a positive one.

At the end of the lesson, the learners will know how to implement alternatives to "I don't know."

The lesson will conclude with a full training review.

Lesson Introduction

- De-escalating upset customers
 - Introduction to CARP
 - Practice strategies
 - Summary
- Implementing "I don't know" alternatives
 - Overview of strategies
 - Exercise-Audio scenarios and discussion
 - Summary
- Full Training Review

Introduction (cont'd)

Go over: the objectives for the lesson.



Objectives

In this lesson, you'll:

- Be able to remain in control of a call.
- Acknowledge the customer's concern.
- Refocus the customer back to the issue.
- Work with the customer to reach a solution.
- Implement alternatives to "I don't know."



Objectives

Given a call from an unsatisfied customer, telephone operators will

- Remain in control of the call.
- Acknowledge the customer's concern.
- Refocus the customer back to the issue.
- Work with the customer to reach a solution.
- Implement alternative to "I don't know."

Go over: the topics for the lesson.



Topics

This lesson includes the following topics:

Topic		Page
5	Introduction	
6	De-escalating upset customers	
7	Implementing "I don't know" alternatives	
8	Full Training Review	

CARP for De-Escalating Upset Customers

Explain: that encountering upset and unsatisfied customers will be inevitable.

Explain: what de-escalation is and why it is important.

Ask: learners to think about one of the questions on the slide and share a response with a partner.

Move: around the room and listen to the discussions, taking note of points to address in the event there are no volunteers to share their

Connect: the learners' responses to where they fit in the CARP spectrum after they are shared.



Introduction

De-escalation is the behaviors and process that customer service and telephone operators use when they receive a call from an upset or angry customer. The goal is avoid antagonizing the conflict to the point where customer relationships are damaged or severed. Instead, this process allows agents to work toward a solution that satisfies the customer.



De-escalation is important because our goal is to satisfy customers. Loyal customers increase profits. Customers will continue to patronize companies that provide great service, along with great products.

Exercise: Ask the group to think about the following questions. Have them share their response to ONE question with a partner.

- What can be done during a call with an upset or unsatisfied customer to lead to a positive resolution outcome?
- Tell us about a time when you were able to satisfy an angry or upset customer. What did you do to ensure a positive outcome?

After 5 minutes or when the conversation naturally comes to a close, ask if anyone will share their response. As a segue, connect the learners' responses to where they fit in the CARP spectrum



Introduction

- What is de-escalation?
- Why is it important?
- Discuss: What can be done during a call with an upset or unsatisfied customer to lead to a positive resolution outcome?
OR Tell us about a time when you were able to satisfy an angry or upset customer. What did you do to ensure a positive outcome?

CARP for De-Escalating Upset Customers (cont'd)

Explain: the four steps of CARP.



Point out: CARP is not always a linear, perfect step-by-step process. Callers do not follow a script so we must be ready adjust our responses accordingly.

Ask: what questions they have before we begin.

Note: handout the job aid at this point and mention that you'll be referring to the aid during the course.

CARP is an acronym that describes the four strategies that can be taken to de-escalate a call with an angry customer.

1. Establish Control
2. Acknowledge the customer and the concern.
3. Refocus
4. Problem Solve





CARP can be a relatively nonlinear process. Learners will find that there may be overlap in the strategies or that they will need to move on a continuum when trying to de-escalate a call. Because every situation is different, telephone operators must be prepared to execute strategies at any point during the call.



CARP for De-Escalation

- Control the call.
- Acknowledge the customer's concern.
- Refocus the customer back to the issue.
- Problem Solve: work with the customer to reach a solution.

CARP: Strategies for De-escalation

 <h4>Control</h4> <ul style="list-style-type: none"> • Remain calm. • Don't take it personally. • Don't interrupt, even if you think you know the problem or think you have the solution. • Use your best listening skills and be patient. 	 <h4>Acknowledge</h4> <ul style="list-style-type: none"> • Actively sympathize. • Establish rapport. • Apologize gracefully. <ul style="list-style-type: none"> ◦ "I can understand how frustrating it is when..." ◦ "I realize how complicated it is to..." ◦ "I cannot imagine how upsetting it is to..." ◦ "I know how confusing it must be when..." ◦ "I'm so sorry to hear that..." ◦ "I completely understand the reason why / your situation..."
 <h4>Refocus</h4> <ul style="list-style-type: none"> • Actively listen; respond accordingly. • Paraphrase the concern. • Ask open-ended questions. • Reassure and transition: <ul style="list-style-type: none"> ◦ "I will assure/ensure that..." ◦ "What I will do for you right away is..." ◦ "Right now, let's take care of your number one concern/issue which is..." ◦ "I'm glad you called today so that we can take care of this right away." ◦ "Let's see if we can get back to your concern." ◦ "I'm sure you want to resolve this as much as I do. Can I ask you a few questions to see what we can work out?" ◦ "I know your time is valuable, so maybe we can see how we might resolve this?" 	 <h4>Problem Solve</h4> <ul style="list-style-type: none"> • Apologize and reassure again. • Determine what the customer needs/wants. • Provide options and timelines (review the following resources) <ul style="list-style-type: none"> ◦ _____ ◦ _____ ◦ _____ ◦ _____ • Confirm satisfaction. • Plan for follow up.

Control

Explain: telephone operators must be in control of their reactions, as well as establish control with the customer on the phone.

Go over: the control guidelines, reminding the learners that this is not an all-encompassing list.

Remind: them that listening patiently can defuse a situation, as long as the customer feels acknowledged in his or her complaint.

Ask: the learners if they have any suggestions for what has worked for them in terms of establishing control in the conversation.



Control

The first step to de-escalating conflict is to remain in control.

- Remain calm. When a customer starts yelling or being otherwise rude, there is nothing to be gained by responding in a similar manner.
- Don't take it personally. Remember, the customer is not angry with you; they are displeased with the performance of your product or the quality of the service you provide.
- Don't interrupt, even if you think you know the problem or think you have the solution. If you try to shout over the customer or interrupt, then the customer will concentrate on the verbal battle for attention and will not pay attention to the importance of your message. If you want your message to be heard, wait for the customer to pause or transition. Eventually the customer will have to lower his or her voice to hear what you are saying.
- Use your best listening skills and be patient. The first thing an angry customer wants is to vent. To do so, they need someone to listen—and, for better or worse, you are that person.



Control

- Remain calm. Don't push back.
- Don't take it personally.
- Don't interrupt; wait for customer to pause or transition.
- Be Patient.
- Listen attentively and take notes.

Control (cont'd)

Use: the following audio files in this order:

ControlExer1.mp3

ControlExer2.mp3

ControlExer3.mp3

Refer: to De-escalation Worksheet, Exercise A.

Remind: the learners to refer the job aid for easy phrases that describe how to stay in control.

Connect: the learners' responses to the criteria listed on the job aid. Point out the following:

Call One: Score 1 or 2 (low)

- *Had a really irritated tone.*
- *Interrupted the customer several times during the call.*
- *Kept asking the customer to repeat himself/wasn't listening.*
- *Never apologized or acknowledged what happened to the order.*

Calls Two and Three: Score 4-5 (high)

- *Took great notes because he was able to paraphrase the customer's problem.*
- *Didn't raise his voice, even though the customer was quite aggressive at the beginning of the call; was really friendly the whole time.*
- *Couldn't see him but could tell he was smiling on the other end.*
- *Apologized; explained how he would feel upset too.*
- *Waited for the customer to finish; found a lull in the conversation before speaking.*



Exercise

We're going to listen to three calls. For each call, you will give an overall rating on a 1 to 5 scale of how well the telephone operator remained in control of the call. A score of a 1 is the lowest rating and a score of 5 is the highest rating. Next to each rating, qualify the number with a statement explaining why you gave the rating. Please listen carefully as you will only hear each call once.

After each call, you will receive a couple minutes to record your response on the de-escalation exercise worksheet. Then we will discuss what you observed during the call.

Remaining in Control: Let's Practice!

Listen to the provided calls. Give each telephone operator a rating (with 1 being the lowest and 5 being the highest) based on how well you believe he/she remained in control of the call.



Call Number	Rating (1-5)	Explanation
1		
2		
3		

Control (cont'd.)

De-Escalation Exercises

Exercise A: Remaining in Control

Listen to the provided calls. Give each telephone operator a rating (with 1 being the lowest and 5 being the highest) based on how well you believe he/she remained in control of the call. For each rating, write a brief explanation. Refer to your de-escalation job aid for ideas.



Call Number	Rating (1-5)	Explanation
1		
2		
3		

Exercise B: Acknowledging Customers and Their Concerns

Review the following scenarios. Explain what is effective or ineffective about how the telephone operator acknowledged the customer.

TO: Thank you for calling PJ Enterprises. My name is _____. With whom am I speaking?

C: Shannon.

TO: How can I help you?

C: I just got a delivery from you guys. It was supposed to be the Happy Tea Kettle playset that was on page 309 of your catalog. What came in the mail was an actual tea kettle! How did this happen?

TO: What's the packing number on the slip?

C: Uh X-76337CJ39. But like I said, how did this happen? Everything was confirmed when I placed the order. Deena or whatever her name was who took it said the play set was in stock and was going to be delivered no problem. It was really important that I get that tea set for my daughter by the end of the week. We've had a tough----

TO: Please hold while I look up that order.

C: Fine, but that tea set was a really big deal for my daughter—

(Hold music)

TO: Okay, I don't see why you received that other thing instead of what you ordered. I guess you can just return it. What was it again?

C: A tea kettle?

TO: No, what you were supposed to get in the first place?

C: Haven't you been listening?!? It was the Happy Tea Kettle play set. My daughter had her absolute heart on it. She picked it out with her grandma right from the catalog and her grandma is very sick right now. We needed it this weekend for when we visit so my daughter and her can play their tea parties.

TO: It's actually not in stock anymore. We're supposed to have them back in at the end of the month.

C: Seriously, that's the only thing you're going to tell me.

TO: It's out of my hands.

C: I want to speak to your supervisor. NOW!

Acknowledge

Explain: that establishing control and acknowledging the customer's concern may happen simultaneously.

Explain: You will have needed to actively listen to the caller in order to correctly acknowledge the concern.

Go over: the job aid and the list of phrases that the learners can use during the conversation to acknowledge the customer's concern.

Remind: You can drastically improve the customer experience by taking a few seconds to build rapport by simply expressing genuine empathy.



Acknowledge the Customer and the Concern

The second step, which sometimes occurs at the same time as remaining in control, is to acknowledge the customer and his/her concern.

- **Actively sympathize.** After the customer vents, he wants to know you understand where he's coming from and how he or she feels. Express sympathy for their unpleasant customer experience. Respect and understanding go a long way to acknowledge the concern and the caller.
- **Establish rapport** by addressing your customer by name. "Once you use a name, you're suddenly speaking with a real person; a customer who has a job and a life and a legitimate reason behind his or her frustration, rather than a faceless "ma'am." Interject the caller's name into the conversation intermittently.
- **Apologize gracefully.** Whether the customer's complaint is legitimate or not is really irrelevant. If you want her to *stay* a customer, you need to express an apology for the problem they are having (or perceive to be having).
- **Practice empathy.** Imagine being the customer's shoes.

Acknowledge

- Refer to the caller by name
- Apologize gracefully. Actively sympathize.
 - "I can understand how frustrating it is
 - "I imagine how upsetting it is to..."
 - "I'm so sorry to hear that..."
 - "I'm glad you called today so that we can take care of this right away."

Acknowledge (cont'd)

Refer: to De-escalation Exercise B on worksheet.

Connect: the learners' responses to the criteria listed on the job aid.

Point out the following:

TO never referred to the customer by name.

Never apologized.

Never acknowledged what was important to the customer.

Never worked with the customer to find a solution (other tea party related item to express ship by end of the week, etc.)

Cut the customer off mid-sentence.

Wasn't listening; needed customer to repeat herself.



Exercise

We're now going to review a transcript of a call. Take turns with a partner reading the part of the telephone operator (TO) and the customer (C).

With your partner, discuss opportunities where the telephone operator could have done a better job acknowledging the customer. This call did not have to reach the point of supervisor intervention. What else could the telephone operator have done? Write your answers in the script or in the margins

When you are done, we will share your ideas with the group.

Acknowledge: Let's Practice

- Take turns with a partner reading the parts (TO and C)
- At what point in the conversation could the TO have done a better job acknowledging the customer? What should the TO have said?
- What else could the telephone operator have done better?

(De-escalation Exercise B)



Acknowledge (cont'd.)

De-Escalation Exercises

Exercise A: Remaining in Control

Listen to the provided calls. Give each telephone operator a rating (with 1 being the lowest and 5 being the highest) based on how well you believe he/she remained in control of the call. For each rating, write a brief explanation. Refer to your de-escalation job aid for ideas.

Call Number	Rating (1-5)	Explanation
1		
2		
3		

Exercise B: Acknowledging Customers and Their Concerns

Review the following scenarios. Explain what is effective or ineffective about how the telephone operator acknowledged the customer.

TO: Thank you for calling PJ Enterprises. My name is _____. With whom am I speaking?

C: Shannon.

TO: How can I help you?

C: I just got a delivery from you guys. It was supposed to be the Happy Tea Kettle playset that was on page 309 of your catalog. What came in the mail was an actual tea kettle! How did this happen?

TO: What's the packing number on the slip?

C: Uh X-76337CJ39. But like I said, how did this happen? Everything was confirmed when I placed the order. Deena or whatever her name was who took it said the play set was in stock and was going to be delivered no problem. It was really important that I get that tea set for my daughter by the end of the week. We've had a tough----

TO: Please hold while I look up that order.

C: Fine, but that tea set was a really big deal for my daughter—

(Hold music)

TO: Okay, I don't see why you received that other thing instead of what you ordered. I guess you can just return it. What was it again?

C: A tea kettle?

TO: No, what you were supposed to get in the first place?

C: Haven't you been listening?!? It was the Happy Tea Kettle play set. My daughter had her absolute heart on it. She picked it out with her grandma right from the catalog and her grandma is very sick right now. We needed it this weekend for when we visit so my daughter and her can play their tea parties.

TO: It's actually not in stock anymore. We're supposed to have them back in at the end of the month.

C: Seriously, that's the only thing you're going to tell me.

TO: It's out of my hands.

C: I want to speak to your supervisor. NOW!

Refocus

Explain: that refocusing may feel like a combination of control and acknowledgement. CARP is not a perfect linear sequence.

Point out: that the telephone operator will need to exercise judgment about how to transition the customer into problem solving.

Remind: Problem solving will not be easy to achieve if the customer is still too emotional.

Go over: the rest of the sample phrases on the job aid.

Ask: what questions they have.



Refocus the customer back to the issue at hand

In order to move onto problem solving, you will need to get the customer to a point where he/she is ready to move forward. Refocusing the customer moves him/her away from the emotional issue and allows him/her to work with you toward a solution.

- Active listening: continue to truly listen to customer; take notes, and eliminate other distractors around your workstation.
- Timing for responses: Similarly to how you established control at the onset of the call, you will need to feel for the right time to interject. When the customer pauses (like a break in the conversation or change in the tone of the voice) is a good time to use of the reassurance phrases listed below.
- Recap/paraphrase: reference your notes, paraphrase the concern. Be very clear about what the concern is and what the customer needs. This shows that customer that you were really listening.
- Open-ended questions: Ask open ended questions to elicit more information in case the customer needs to clarify any part of the concern.
- Reassurance and transition phrases:
 - *"I will ensure that..."*
 - *"What I will do for you right away is....."*
 - *"I assure you I will try my best...."*



Refocus

- Active listening
- Timing for responses
- Recap/paraphrase
- Open-ended questions
- Phrases that reassure and transition

Problem Solve

Explain: the methods of the problem solving stages

Point out: Problem-solving can only work once the customer is calm enough to step back from the emotions, and when they are ready to work together to solve the issue.



Problem Solve

Problem solving is the last step of the CARP de-escalation model. Problem solving within the model involves exchanging information, and trying to identify the exact problem, and what the customer needs and wants regarding the problem issue. So, you may ask questions to determine where the other person is coming from. Ultimately, both parties should be coming up with suggestions for solutions to the actual problem.

- Apologize and reassure again.
- Ask customer what he or she would like for the resolution.
- Give the options and the timelines for those options.
- Confirm the customer is satisfied with the resolution.
- Ask the customer what else can be done to make the experience better or to improve the situation.
- Follow up actions in a timely and accurate manner. Make communication plan if you will need to follow up with the customer.



Problem Solve

- Apologize and reassure again.
- Determine what the customer needs/wants.
- Provide options and timelines
- Confirm satisfaction.
- Plan for follow up.

Problem Solve (cont'd)

Use: the following audio files:
ProbSolve1.mp3

Refer: to the De-escalation Worksheet
Exercise C

Remind: that this table excerpt is from the Call Quality Rubric, which measures all calls, not just ones for de-escalation. This call, however, is one where a de-escalation was necessary. N/A column should not be filled out because all the strategies are applicable in this call.

Connect: the learners' responses to the criteria listed on the job aid.

Point out:

The exemplary job done by the telephone operator. Yes's should be in every column.

- *She was able to paraphrase the customer's problem*
- *Friendly, calm, smiling through voice.*
- *Apologized; explained how he would feel upset too.*
- *Asked customer for what he wanted as the resolution.*
- *Provided options and timelines*
- *Waited for the customer to finish; found a lull in the conversation before speaking*



Exercise

We will now listen to a call where we will put all of the 4 strategies of CARP together. Place a check mark in the *yes* column if you believe the telephone operator utilized that particular strategy. Place a check mark in the *no* column if you believe the telephone operator did not utilize that particular strategy. Place a check mark in *n/a* if the call did not present a de-escalation scenario. List any comments that you feel are necessary to explain your responses.

CARP: Let's Practice!

Let's listen to a call. Score the telephone operator on his/her strategies.

De-escalation Strategies (CARP)	Yes	No	N/A	Comments
Remained in control of the call. Let the customer speak. Did not interrupt. Did not try to explain the issue with humor. Did not provide or push back.				
Acknowledged the customer's concern by using phrases like: "I can understand how frustrating it is when..." "I cannot imagine how upsetting it is..." "I'm so sorry to hear that..."				
Reassured the customer by doing the following: Rephrased or paraphrased the concern. Asked open-ended questions for clarification. "Let me see what I can do for you. I would really like to help." "I'm glad you called today so that we can take care of this right away."				
Developed a solution with the customer to achieve satisfaction by doing the following: Apologized (again). Asked "Is that better?" Gave options and approximate timelines. Confirmed the customer's satisfaction. Followed up actions in timely and correct manner in order to keep commitment to the customer.				

Problem Solve (cont'd)

Exercise C: Control, Acknowledge, Refocus, and Problem Solve

Let's listen to a call. Use this excerpt from the call quality rubric to record how well you believe the telephone operator utilized CARP during the call.

De-escalation Strategies (CARP)	Yes	No	N/A	Comments
Remained in control of the call. <i>Let the customer speak; Did not interrupt.</i> <i>Did not try to lighten the mood with humor.</i> <i>Did not provoke or push back.</i>				
Acknowledged the customer's concern. Possible options. <i>"I can understand how frustrating it is when..."</i> <i>"I cannot imagine how upsetting it is to..."</i> <i>"I'm so sorry to hear that..."</i>				
Refocused the customer. Possible options: <ul style="list-style-type: none"> ○ <i>Recapped or paraphrased the concern.</i> ○ <i>Asked open-ended questions for clarification.</i> <i>"Let me see what I can do for you first. I would really like to help."</i> <i>"I'm glad you called today so that we can take care of this right away."</i>				
Developed a solution with the customer to achieve satisfaction. Possible options: <ul style="list-style-type: none"> • <i>Apologized (again).</i> • <i>Avoided "I don't know;" Gave options and approximate timelines.</i> • <i>Confirmed the customer's satisfaction.</i> • <i>Followed up actions in a timely and correct manner in order to keep commitment to the customer.</i> 				

Problem Solve (cont'd)

Explain: that the learners will develop a script that includes all four aspects of CARP. To save time, learners do not have to write an entire script word for word. They will only write what the customer plans to say. They may use abbreviations and leading phrases as a reminder to themselves of what they want to say during the course of the role-play.

Encourage: learners to add these to their job aid.

Remind: learners that these role-plays should resemble real calls. The learners playing customers should make their side of the conversation realistic (not drastically over the top dramatic or difficult for the sake of being difficult)

Move: around the room and listen for learners making connections to the four aspects of CARP.

Ask: each group to present their role-play in front of the group. First ask both partners involved about how the telephone operator incorporated CARP strategies. The questions can be varied to each group (i.e. ask one group about establishing control, then ask the next group about acknowledging) to highlight what the telephone operators did well. You can also ask the learners in the audience to participate about what they observed as exemplary use of CARP.



Exercise: With a partner, the learners will brainstorm several “angry customer” scenarios they encounter on the job. From the list, each group member will choose one scenario and develop some lines of a script that they will use as the customer during role play that provides authentic practice.

Each partner will take turns being the telephone operator and the customer. The person playing the customer will use his/her script to provide a scenario to the telephone operator. The telephone operator will not have a script; instead, he or she can refer to the job aid. He or she must treat the situation as though it is a phone call with an actual customer.

The goal is that the telephone operator will use role- play exercise to show the correct way to de-escalate a call. The telephone operator should try to use all four aspects of CARP.

CARP: Putting It All Together! Role Play

- Brainstorm several “angry customer” scenarios.
- From the list, choose one scenario that will be used for customer role- play.
- Each person will take turns being the TO and customer.
- TOs must use CARP to de-escalate whatever situation the customer poses.
- Refer to job aid and rubric for exercise C.

Summary

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

Tell: each of them how they did from the standpoint of CARP.

Ask: learner to about what is the easiest and most difficult part of:

- Controlling the call
- Acknowledging
- Refocusing
- Problem Solving

Ask: what questions they have.

Debrief and Review

CARP is an acronym that describes the four steps that can be taken to de-escalate a call.

1. (Establish) Control
2. Acknowledge the customer and the concern.
3. Refocus
4. Problem Solve

Learners will find that there may be overlap in the stages or that they will need to move on a continuum when trying to de-escalate a call. Because every situation is different, telephone operators must be prepared to execute these stages/strategies at any point during the call.

Summary: CARP for De-Escalation

- Control the call.
- Acknowledge the customer's concern.
- Refocus the customer back to the issue.
- Problem Solve: work with the customer to reach a solution.

QUESTIONS??



This lesson was adapted from the sources listed in the recommended reading section at the end of this document.

Additional Resources

Recommended Reading

References

Augustine, A. (n.d.). “4 Brilliant Tips for Dealing With Angry Customers.” Retrieved from <https://www.themuse.com/advice/4-brilliant-tips-for-dealing-with-angry-customers>

Bascal, R. (2000). “Using The CARP System To Manage Conflict Constructively.” Retrieved from <http://conflict911.com/conflictarticles/carp3.htm>

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Golden, M. (2012). “Phrases that convey empathy to Customers.” Retrieved from <https://myragolden.wordpress.com/2012/07/30/7-phrases-that-convey-empathy-with-customers/>

Mehrmann, J. (n.d). “10 Powerful Steps to Defuse Angry Customers.” Retrieved from <http://www.businessknowhow.com/marketing/diffuse-anger.htm>





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Handouts and Job Aids

Write a Greeting*	---
Write a Closing*	---
Basic Ingredients Practice Plan*	---
Active Listening Script*	---
Building Satisfaction Practice Plan*	---
Sales Strategy Worksheet*	---
Sales Strategy Practice Plan*	---
CARP Job Aid	45
De-Escalation Exercise Worksheets	46
Call Quality Rubric	48

Items marked with an asterisk (*) will be available with the fully executed facilitator’s guide.

CARP Strategies for De-Escalation

 <h3>Control</h3> <ul style="list-style-type: none">• Remain calm.• Don't take it personally.• Don't interrupt, even if you think you know the problem or think you have the solution.• Use your best listening skills and be patient.	 <h3>Acknowledge</h3> <ul style="list-style-type: none">• Actively sympathize.• Establish rapport.• Apologize gracefully.<ul style="list-style-type: none">○ <i>"I can understand how frustrating it is when."</i>○ <i>"I realize how complicated it is to..."</i>○ <i>"I cannot imagine how upsetting it is to..."</i>○ <i>"I know how confusing it must be when..."</i>○ <i>"I'm so sorry to hear that..."</i>○ <i>"I completely understand the reason why / your situation..."</i>
 <h3>Refocus</h3> <ul style="list-style-type: none">• Actively listen; respond accordingly• Recap/paraphrase• Open-ended questions• Reassurance and transition phrases<ul style="list-style-type: none">○ <i>"I will assure/ensure that..."</i>○ <i>"What I will do for you right away is....."</i>○ <i>"Right now, let's take care of your number one concern/issue which is..."</i>○ <i>"I'm glad you called today so that we can take care of this right away."</i>○ <i>"Let's see if we can get back to the initial issue here"</i>○ <i>"I'm sure you want to resolve this as much as I do. Can I ask you a few questions to see what we can work out?"</i>○ <i>"I know your time is valuable, so maybe we can see how we might resolve this?"</i>	 <h3>Problem Solve</h3> <ul style="list-style-type: none">• Apologize and reassure again.• Give the options and the timelines for those options. Review the following resources for options:<ul style="list-style-type: none">○ _____○ _____○ _____• Confirm satisfaction.• Plan for follow up or action items.

De-Escalation Exercises

Exercise A: Remaining in Control

Listen to the provided calls. Give each telephone operator a rating (with 1 being the lowest and 5 being the highest) based on how well you believe he/she remained in control of the call. For each rating, write a brief explanation. Refer to your de-escalation job aid for ideas.

Call Number	Rating (1-5)	Explanation
1		
2		
3		

Exercise B: Acknowledging Customers and Their Concerns

Review the following scenarios. Explain what is effective or ineffective about how the telephone operator acknowledged the customer. Write your ideas in the script or in the margins.

TO: Thank you for calling PJ Enterprises. My name is _____. With whom am I speaking?

C: Shannon.

TO: How can I help you?

C: I just got a delivery from you guys. It was supposed to be the Happy Tea Kettle play set that was on page 309 of your catalog. What came in the mail was an actual teakettle! How did this happen?

TO: What's the packing number on the slip?

C: Uh X-76337CJ39. But like I said, how did this happen? Everything was confirmed when I placed the order. Deena or whatever her name was who took it said the play set was in stock and was going to be delivered no problem. It was really important that I get that tea set for my daughter by the end of the week. We've had a tough--

--

TO: Please hold while I look up that order.

C: Fine, but that tea set was a really big deal for my daughter—

(Hold music)

TO: Okay, I don't see why you received that other thing instead of what you ordered. I guess you can just return it. What was it again?

C: A teakettle?

TO: No, what you were supposed to get in the first place?

C: Haven't you been listening?!? It was the Happy Tea Kettle play set. My daughter had her absolute heart on it. She picked it out with her grandma right from the catalog and her grandma is very sick right now. We needed it this weekend for when we visit so my daughter and her can play their tea parties.

TO: It's actually not in stock anymore. We're supposed to have them back in at the end of the month.

C: Seriously, that's the only thing you're going to tell me.

TO: It's out of my hands.

C: I want to speak to your supervisor. NOW!

Exercise C: Control, Acknowledge, Refocus, and Problem Solve

Let's listen to a call. Use this excerpt from the call quality rubric to record how well you believe the telephone operator utilized CARP during the call.

De-escalation Strategies (CARP)	Yes	No	N/A	Comments
Remained in control of the call. <i>Let the customer speak; Did not interrupt.</i> <i>Did not try to lighten the mood with humor.</i> <i>Did not provoke or push back.</i>				
Acknowledged the customer's concern. Possible options. <i>"I can understand how frustrating it is when..."</i> <i>"I cannot imagine how upsetting it is to..."</i> <i>"I'm so sorry to hear that..."</i>				
Refocused the customer. Possible options: <i>Recapped or paraphrased the concern.</i> <i>Asked open-ended questions for clarification.</i> <i>"Let me see what I can do for you first. I would really like to help."</i> <i>"I'm glad you called today so that we can take care of this right away."</i>				
Developed a solution with the customer to achieve satisfaction. Possible options: <i>Apologized (again).</i> <i>Avoided "I don't know;" Gave options and approximate timelines.</i> <i>Confirmed the customer's satisfaction.</i> <i>Followed up actions in a timely and correct manner in order to keep commitment to the customer.</i>				

PJ Enterprises Call Quality Rubric						
Telephone Operator Name						
Call Reviewer's Name						
Date and Time of Call						
Product Reference Number						
Customer Type		New	Returning	N/A		
Call Type		New Order	Return	Question/Info Seeking	Complaint	Other
Total Score:		95-100% Meets Expectations		90-94% Proficiency		
		85-89% Approaching Proficiency		84-or less Below Proficiency		
		Yes	No	N/A	Comments	
	Call Anticipation	5%				
	Answered the call within three rings.					
	Displayed Product Guide before the onset of the phone call					
	Customer Service	30%				
	Greeting and Introduction					
	Used standard call greeting per standardized chat flow.					
	Professionalism, energy, and enthusiasm established at onset of call.					
	Customer Acknowledgement/Active Listening/Open-Ended Questions					
	Addressed the caller by first and or last name (with appropriate prefix); or Sir/Ma'am/Miss if name is difficult to pronounce.					
	Used one of the following phrases per the standardized chat flow: <i>"I would be happy to assist you with __."</i> <i>"It will be my pleasure to __."</i> <i>"I understand that __."</i>					
	Avoided silence; kept the customer informed about what was happening.					
	Used clear and concise words to ensure the customer that the TO understood the purpose for the call.					
	Used Open-ended questions to clarify or seek more information from the customer.					
	Accurately understood the nature of the customer's inquiry.					

		Yes	No	N/A	Comments
	De-escalation Strategies (CARP)				
	Remained in control of the call <i>Let the customer speak; Did not interrupt</i> <i>Did not try to lighten the mood with humor.</i> <i>Did not provoke or push back.</i>				
	Acknowledged the customer’s concern by using phrases like: <i>“I can understand how frustrating it is when..”</i> <i>“I cannot imagine how upsetting it is to...”</i> <i>“I’m so sorry to hear that...”</i>				
	Refocused the customer by doing the following: <i>Recapped or paraphrased the concern.</i> <i>Asked open-ended questions for clarification.</i> <i>"Let me see what I can do for you first. I would really like to help."</i> <i>"I'm glad you called today so that we can take care of this right away."</i>				
	Developed a solution with the customer to achieve satisfaction by doing the following: <i>Apologized (again)</i> <i>Avoided “I don’t know;” Gave options and approximate timelines</i> <i>Confirmed the customer’s satisfaction</i> <i>Followed up actions in a timely and correct manner in order to keep commitment to the customer.</i>				
	Taking Orders	30%			
	Searched the product reference to answer customer’s question about a product.				
	Gathered appropriate information by using acknowledgement phrases and open-ended questions.				
	Repeated sensitive information to ensure accuracy for a first-call resolution.				
	Accurately summarized orders and estimated delivery.				

		Yes	No	N/A	Comments
	Upselling/Cross Selling	10%			
	Recommended appropriate product/service to meet customer need or extend the relationship.				
	Effectively tied product/service benefit to the customer situation/need.				
	Quickly referenced information in the product guide to answer customer questions.				
	Call Closing	5%			
	Used appropriate call closing statements per the standardized chat flow.				
	Ensured that all the customer's needs were met.				
	Accurately documented any additional information (if applicable)				
	Thanked the customer and wished the customer a good day.				
	Communication Skills	20%			
	Used professional language and appropriate grammar.				
	Spoke clearly and at a pace/rate appropriate for the customer.				
	Expressed politeness by saying please, thank you, I am sorry, etc.				