# Instructors Guide

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.
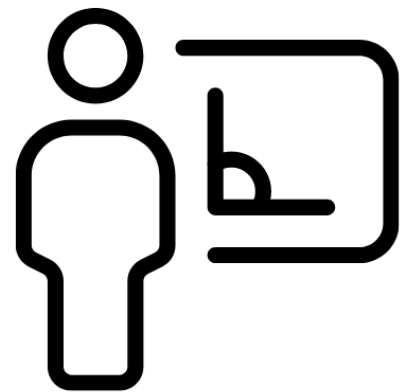
Module Two: What Is Customer Service?

Customer service is a general field that involves assisting customers in a range of issues, such as purchasing, troubleshooting, installation and even disposal of products or services. Customer service is designed to focus on the customer and how they can benefit from your product or service, so it's important to do your part in the delivery.

Support vs. Service

Customer support and customer service are often mistaken for the same thing. While they are very similar, support and service do have some variations. Customer service generally refers to a type of service the customer received before, during, or after a sale. This can include assisting someone while they choose a product/service, being the cashier as customers pay for the service/product, and even packaging the items they have purchased. It's the service of the industry. Customer support goes beyond just the sale of the item; it focuses more on the customer's selection, use and satisfaction of the product. Support aspects often include help with product selection, installation, and handling any problems that may arise. The term service is focused more on the actual task, such as taking a returned item. But customer support is designed to ask why you want to return the item; ask if there is a problem to be fixed, and then accept the return if nothing else can be done.

Estimated Time	7 minutes
Topic Objective	Review customer support and customer service.

Topic Summary	**Support vs Service** Discuss the similarities and differences of support vs. service.
Materials Required	**Flipchart/Whiteboard & markers**
Planning Checklist	None
Recommended Activity	List and discuss different customer support and services.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What are some differences between customer service and support?

Who Participates?

When it comes to customer support, everyone in the company participates. After all, customer satisfaction is up to everyone. Within every company, there is typically some form of employee process or chain of command to follow. Customer support often begins with a 'front line', or a set of agents a customer can reach out to for support at any time before, during, or after a sale. A common example would be agents in a call center, or agents that speak with the customer over webchats and emails. If the agents are unavailable or unable to help, a team lead or customer lead can take over. If leads are not available, managers or directors can step in. No one is above providing customer support to customers that need it.

Estimated Time	**7 minutes**
Topic Objective	Review who participates in customer support.
Topic Summary	**Who Participates?** Discuss how everyone is involved in customer support.
Materials Required	**Flipchart/Whiteboard & markers**
Planning Checklist	None
Recommended Activity	List and discuss how each different department might participate in customer support.

Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Are there any employees exempt from customer support?

Metrics

Customer support metrics can cover a broad range of categories. The goal is to identify areas that work well, and to utilize them, while also identifying any areas that are lagging so they can be fixed. Many companies will break down and divide customer support metrics into different categories and areas of interest, but some of the basic levels to start with include team level metrics, individual agent metrics and then the case, or assignment level metrics. Team level metrics monitor and evaluate how the company team performs as a whole, including overall response time and customer satisfaction. Individual level metrics focus on the individual agent, and focus on aspects such as the case load completion rate and their interactions with the customer. Case level metrics focus on the actual problem itself and how agents input them, resolve them, or the amount of time spent on the problem.

Three main areas of metrics:

- Team level metrics
- Individual level metrics
- Case/Ticket level metrics

Estimated Time	7 minutes
Topic Objective	Review the three different metrics.
Topic Summary	**Metrics** Discuss the three different metrics.
Materials Required	**Flipchart/Whiteboard & markers**
Planning Checklist	None
Recommended Activity	List and discuss different metrics.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.

Review Questions	What are customer support metrics?

Trends

Technology has transformed our lives, including how we shop. The trends in customer support are shifting toward how companies can help their customers in the electronic world. Common trends that are already taking hold include using mobile applications for agent interaction and companies creating self-service or Frequently Asked Questions (FAQs) forums for customers. While it can be difficult to predict trends, many companies choose to start trends of their own and find new ways to support customers that are sure to catch on. Trends can cover any area of customer support, such as future agent training, tools available to the customer, the effects of social media, or even the potential for competition in a set amount of time. Since customers are always changing, the support they need changes too – and so do the trends.

Estimated Time	7 minutes
Topic Objective	Review trends in customer support.
Topic Summary	**Trends** Discuss the changing trends in customer support.
Materials Required	**Flipchart/Whiteboard & markers**
Planning Checklist	None
Recommended Activity	List and discuss some of the newer trends in customer support.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What do customer support trends mean?

Practical Illustration

Zach and Pearl were in training at the customer support center of Ragsdale Fashions. From the beginning, Zach and Pearl learn that the customer support department is much more involved with their customers and go beyond mere customer service. Pearl took notes of some of the upcoming trends the company was looking into for the next year, such as self-service tools and how employees can assist customers with easy returns. Zach liked the philosophy that all employees participated in customer support and that everyone played a part. Before the meeting ended, they were told about the variety of metrics used to calculate the company's customer support efficiency as well as their success and fail rates. Zach and Pearl knew they would need to learn a lot more before their first day on the floor.

Module Two: Review Questions

1.) Which of the following is considered to be customer service?

   a) Cashiering
   b) Inventory
   c) Repairs
   d) Customer concerns

   Customer service is defined as any service delivered to the customer before, during, or after the sale.

2.) Which of the following is considered to be customer support?

   a) Cashiering
   b) Product delivery
   c) Product ordering
   d) Installation

   Customer support is defined as focused of the use of the product or service and customer satisfaction.

3.) Which of the following would participate in customer support?

   a) Agents
   b) Team leaders
   c) Managers
   d) All of the above

   Anyone in the organization can participate in customer service.

4.) The first group of agents the customers usually encounter is known as what?

   a) Managers
   b) The front line
   c) Team leads
   d) Customer specialists

   The front line is the first group of employees that a customer encounters.

5.) Which of the following is a team metric?

    a) Individual task completion rates
    b) Cashier/customer relations
    c) Overall response time
    d) Turn-over rates

A team metric is an analysis of the overall performance of the entire team, not individual employees. This could include overall response time of the team, safety records, etc.

6.) Which of the following is an individual metric?

    a) Customer interaction time
    b) Company safety records
    c) Store sales
    d) Problem resolutions

An individual metric focuses on the individual employee, singly. Their customer response times, customer service skills, and absenteeism are examples of the individual metric.

7.) Trends today typically focus on what?

    a) Face to face contact
    b) Electronic support
    c) Voice/telephone
    d) First class mail

As technology advances and integrates itself into customer's daily lives, more focus has been on the internet and smart phone applications.

8.) Which of the following is considered a customer service?

    a) Product price reductions
    b) Mail in rebates
    c) Utilizing social media
    d) Maintenance/installation appointments

As the trend with technology and the internet increases, the use of social media increases also. Customers can be easily reached for feedback, surveys, and promotions through social media.

9.) Customer service is a_____ field that involves assisting customers in a range of issues.

    a) Customer
    b) Employee training
    c) General
    d) Assistance

Customer service is a general field that involves assisting customers in a range of issues

10.) Customer service is designed to focus on the _____.

    a) Problem
    b) Customer
    c) Technology
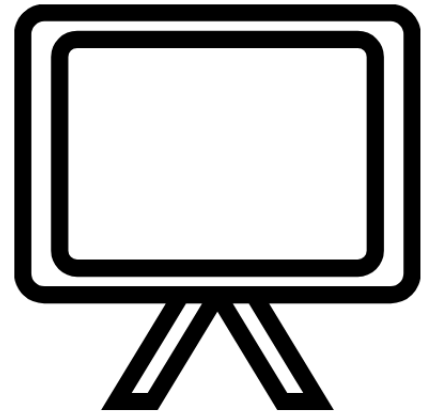   d) Training

Customer service is designed to focus on the customer

PowerPoint Slides

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.
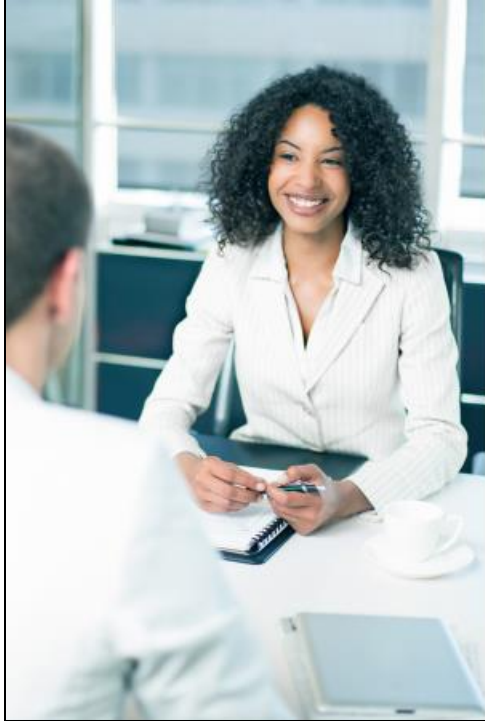
> "
> *Go beyond merely communicating to 'connecting' with people.*
>
> *Jerry Bruckner*

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Who Participates?

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Metrics

Team level metrics

Individual level metrics

Case/Ticket level metrics

Trends

The trends in customer support are shifting toward helping customers in the electronic world.

Practical Illustration

- Support vs. Service
- Who Participates?
- Metrics
- Trends

Module Two: Review Questions

1. Which of the following is considered to be customer service?

A. Cashiering

B. Inventory

C. Repairs

D. Customer concerns

Quick Reference Sheets

Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Customer Support
Quick Reference Sheet

Who Participates?

When it comes to customer support, everyone in the company participates. Within every company there is typically some form of employee process, or chain of command to follow.

Customer support often begins with a 'front line', or a set of agents that a customer can reach out to for support at any time before, during, or after a sale. An example would be agents in a call center or agents that speak with the customer over webchats and emails. If the agents are unavailable or unable to help, a team lead or customer lead can take over. If leads are not available, manager or directors can step in. No one is above providing customer support to customers that need it.
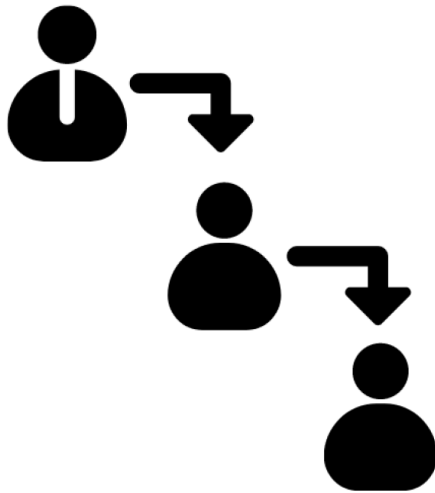
Formal Yet Conversational Style

Although emails can be seen as a casual format of conversation, it is important for companies and businesses to keep their emails formal and professional, but also portray them in a conversational tone so that they are more relatable to the reader.

Conversational style is written in first person, so when you type back to the customer, use phrases such as "I" and "we". Use a greeting that has their name in in it and sign off giving your name. It portrays to the customer that a live person is speaking directly to them and that the email they got back wasn't a form letter or automatic response.
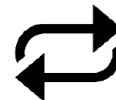
Tips for formal yet conversational style email:

Use a greeting with their name

HELLO
my name is

End with your name

Repeat back to them what was said

Use "I" and "we"

Research Analytics

You have all of the customer data, collected from surveys, feedback boxes, etc. Now what? All of that data needs to be analyzed. You need software that will take all of the information and put it into a readable report. First, you must understand your customers and their circumstances. Was there a power outage in their area? Are there many customers having the same problems? Knowing the circumstances can be helpful in data analysis.

Research analytics are specifically designed to monitor the customers. They aren't simply business intelligence software products. They monitor the number of tickets, the specifics of the tickets, the satisfaction levels of the customers, and other details about the customers. Dashboards, pie charts and reports are a product of these analytical software tools. From these results, decisions can be made about making necessary changes.
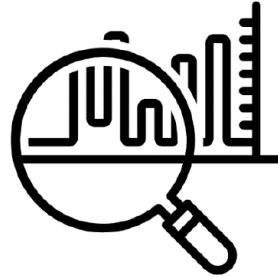
Handouts

Each course is provided with a wide range of worksheets. Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.
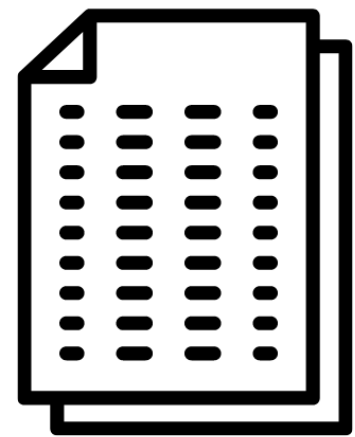
Icebreaker: Related Topic

Include a short activity here that is related to the topic of the workshop. You can use the one below if you like.

1. Have the participants at each table answer the following questions:

   a. Why are they here?

   b. What is their level of experience with customer support?

   c. What they hope to get from this class?

   d. What was their most memorable vacation or trip?

2. Have someone be designated a scribe and have them jot down the answers to question C above.

3. On a separate piece of paper, have the scribe write down the most interesting or exotic vacation or trip from only one table member.

4. Have the scribe hand the note with the answers to question C to you.

5. Have the scribe stand and introduce the table to the class.

6. Then have the scribe share the most interesting vacation or trip from their group.

7. Have the class guess the person that had the most interesting or exotic trip or vacation.

8. Go around to each table until all have given you their answers to question C and shared their most interesting trip or vacation.

9. Debrief by sharing all the answers to question C with the class.

10. Thank participants for sharing.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.
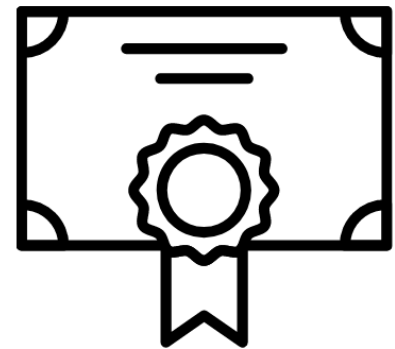
CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Customer Support

Awarded this _____ day of _____ e _____, 20 _____

_____

Presenter Name and Title