Reviving PJ Enterprise

A Facilitator's Guide to Redesigning Customer Service at PJ Enterprise, Inc.

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Introduction

The goal of this facilitator's guide is to equip the trainer with the lesson plans and all resources needed to conduct the training successfully. The purpose of the training is to change how the customer service department operates, so that the customer service representatives have a high rate of success closing sales and pleasing customers. The hope is that after the training, PJ Enterprise, Inc. customers will give mostly positive feedback about their experience, and not only return to buy more merchandise from the company but also promote the company to their friends. If successful, this training and expected outcomes will result in a growing customer base and increased revenue for the company.

To reach this training goal, Fourward Instructional Design, Inc. will provide the following services and deliverables:

- New Product and Customer Service Training
- Product Reference Database Training

This facilitator's guide addresses both of the trainings.

Purpose of this Facilitator's Guide

PJ Enterprises is changing how customer service representatives are trained on the company's products and how they interact with customers over the phone. In order to make these changes, the customer service representatives will go through a new two-day training which will cover the following product reference database training and new product and customer service training. This facilitator's guide provides detailed information and direction to anyone conducting these trainings. It includes step-by-step guidance for an instructor, even if they are new to PJ Enterprises and relatively unfamiliar with the environment.

Target Audience: The audience for this training includes customer service representatives as well as all managers that oversee customer service. In addition, the merchandising manager should go through the training with the customer service staff and management.

Learning Objectives

The Learning Objectives for this course include:

1. Given a customer request prompt, learner will be able to access correct product description using ID or descriptor within 20 seconds and communicate product information to customer.
2. Given a customer service scenario, learners will be able to correctly identify and demonstrate the correct strategy for action.

Learning Environment

Location:

Training is to be held at the PJ Enterprise corporate headquarters in Philadelphia, Pennsylvania. The Human Resources Department will host the training and the head of HR, Sara Finley is the contact person regarding the facilitation of this training. There is a large conference room that can function as a temporary training room. There are a few desktop computers in that room, however, most of the trainees will bring their laptops from their desks.

Prior to the day when training takes place, JP Enterprises will meet with the IT Department to make sure that all employees can access the new software on their laptops and that the security requirements have been implemented.

Equipment and Materials:

- User's manual for telephone system
- Whiteboard
- Projector hooked up to a computer.
- A wall, screen or whiteboard on which to project images/videos.
- Sticky flipchart
- Post-its
- Markers/pens and extra paper.
- Laptops or desktop computer, chair and desk for every trainee.
- Speakers that hook up to the computer for audio for all that is being projected (videos, etc..)

Time Requirements

Time duration estimates for each session are listed in a separate column. No specific time has been assigned to allow flexibility for scheduling purposes. Note that breaks have been built in, however, to allow opportunities for restroom visits and snacks. Total session times (to include breaks) have been included at the end of every enabling objective.

Facilitator Expectations

Prior to Training

It is recommended that facilitators meet with personnel from PJ ENTERPRISES several weeks prior to the training in order to:

1. Gather more information about the audience members' needs and priorities and past experiences with the content
2. To go over the lesson outline, the timing and facility requirements.
3. Request to see the actual room where the training will take place and review with the personnel representative how the equipment will be set up and where the trainees will sit.
4. Solidify access to copiers and other resources they may need to use to prepare for the training.
5. Create a checklist for standard meeting protocol which everyone during the training will need to abide by - for instance, no cellphones, respect one another, etc…
6. Provide a pre-training survey to the customer service trainees asking about their job satisfaction and frustrations they currently encounter on the job.

During Training

During the two days of training, facilitator will assume that the following will take place:

1. All customer service representatives and managers will be on time and present for the entire training.
2. All trainees will be paid their normal hourly rate for attending the training.
3. There will be a one hour lunch break for all trainees both days.
4. Standard meeting protocol will be observed by facilitators as well as all trainees (no cellphones, respect one another, etc…)
5. Formative assessment/check-ins will be conducted throughout the training to ensure all participants feel comfortable and are encouraged to give feedback regarding how the training is going for them - to make sure the hours spent in the training are not wasted.

After Training

1. Provide students with the end of course survey and a certificate saying they went through the training.
2. Follow up with managers a week later as to how the customer service training is working.
3. Two weeks after training, verbally check in with customer service trainees and ask the how their days are going and if they are having any difficulties. The point of this is to see if they are applying the best practices that they learned in training or are they resorting to their old behavior. If they aren't applying the practices, the facilitator can provide a one-page cheat sheet review or checklist to them or their managers to remind them what they need to do.

4. Four weeks after training, provide students with the same survey they received prior to training regarding job satisfaction and frustrations they are encountering.
5. Four weeks after training the facilitator should also work with the head of L & D to analyze the call data - customer satisfaction and sales figures - along with the trainee surveys to see what may need to be done in the near or not-so-near future.
6. A final evaluation report will be written by Fourward ID, Inc., based upon the four week data and will be submitted to management and the facilitator.

Expert Product Knowledge Workshop Objectives

Terminal Objective: Given a customer request prompt, learner will be able to access correct product description using ID or descriptor within 20 seconds and communicate product information to customer.

Enabling Objectives:
1. Demonstrate ability to log in to the database, locate search function, listen for product title or product ID number and effectively search for product.
2. Identify product via keywords in customer description.
3. Effectively communicate product information.

Terminal Objective: Given a customer service scenario, learners will be able to correctly identify and demonstrate the correct strategy for action.

Enabling Objective:
1. Demonstrate the ability to identify the correct and incorrect strategies in a practice scenario with the help of a partner.
2. Identify why certain strategies are incorrect.
3. Properly identify the correct strategies on your own.

Objectives and Facilitator Guide

<table>
<tr><td colspan="2">Terminal Objective: Given a customer request prompt, learner will be able to access correct product description using ID or descriptor within 20 seconds and communicate product information to customer.</td></tr>
<tr><td colspan="2">Enabling Objective 1: Log on to database, locate search function, listen for product title or ID and effectively search for product.</td></tr>
<tr><th>Activities and Methods</th><th>Time Estimate</th></tr>
<tr><td>1. Introduction and Housekeeping:
➢ Introduce self, general training agenda, restroom location, break times,
➢ Ice Breaker activity: members will go around the room saying 2 truths and one lie about themselves. The group will have to figure out which statement is the lie about the person. Each person will have the chance to give their 2 truths and a lie.

3. Introduce Training Objectives (see slide)

4. Brainstorm/Discussion:
"What are some challenges you experience when it comes to communicating with customers about products over the phone?"

➢ Elicit feedback about common issues and experiences, scribe on the whiteboard. Group or categorize into common themes (brainstorm web, etc.)
○ If not yet addressed, ask about access to product information and access speed as an introductory transition to feedback and goals, below.</td><td>10 min

10 min

5 min

5 min

15 min</td></tr>
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5. Presentation (Absorb)

20 min

- Introduce aggregate customer feedback on surveys and operator / customer service representative goals for this fiscal year.
- Introduce the new database as a solution most requested by operators during needs analysis. Play video demonstration of database (shows basic features including step by step of how to search) <link>
- Elicit any questions from the group before moving on to practice activity.

6. Practice Activity (Do) – Info Gap Worksheet

10 min

- Introduce activity:
  "Now that we've seen a step by step video of how to use the basic search function on the database, let's learn by doing as we practice using this new tool."
- Read worksheet directions aloud and summarize task. Demonstrate the example by using the projector, but ask learners to direct you about what to do step by step. *("Okay, what do I need to do first? ...Great, now I've logged in. Next, what should I click?")*

15 min

- Pass out worksheet and set learners free to work at their stations. Inform them of how long they have to complete the activity – 15 minutes.
- Give a five-minute warning before bringing the group back together to debrief.

7. Debrief:

5 min

- Check answers as a group. (Slide 6) Elicit answers from learners and ask them to tally their total at the top.

8. Practice Activity (Connect) – Listening to Calls ➢ Introduce activity: *"So far we've learned how to use the database to search for products. Now let's add another element – a customer request. The goal of this activity is to listen for the correct product information and pull it up within 30 seconds of hearing the customer request."* ➢ Facilitator will play a recording of five calls. Learners will listen to each call and identify a product title or ID number to search for based on call dialogue and pull up that info within 30 seconds. When the learner has the information on the screen, they should raise their hand immediately. ➢ Facilitator will use a stopwatch to time from the moment the customer in the call gives the product information. Visually check to see who has the correct information pulled up on their screen after their hand is raised.	15 min
9. Debrief: ➢ Discussion / Self-Reflection: Work in small groups (4-6 people) to discuss these questions, then come together as a group to talk about what was said. ➢ Inform learners there will be 10 minutes to work in groups, then 10 as a whole. Give a 5 minute time warning before bringing groups together. Discussion Questions: o *How did you do with these two activities?* o *What do you like about this new tool? How do you think it might make customer calls easier?* o *Anything you found challenging or didn't like with the database so far? Any other functionality you'd like to have?*	10 min
BREAK	**10 min**

Total time for Introduction, EO #1	**2 hours**

Enabling Objective 2: Identify product via key words in a customer's description.	
1. Introduction (Absorb): *"Welcome back. So far we've practiced using the database to search for products when the ID or exact name is given by the customer. But as we know, sometimes the customer doesn't have that information readily available, so we are left to fill in the blanks to try to figure out what product they might be talking about. The database is going to help us with that by using the key word search function. This will save time and energy that should reduce miscommunication, call wait times, returns and the overall likelihood of customer dissatisfaction. Let's watch a video to learn the steps."* ➢ Learners watch a video (shows the steps of how to do a keyword search as they see an example scenario of a call with a customer who doesn't know an exact product title or ID.) <link>	10 min
2. Practice Activity (Do) – Matching Worksheet ➢ Summarize the directions for the worksheet (Handout #2): ● Complete worksheet by matching customer quotes with new products, with database as help. ➢ Inform learners they will have 10 minutes to complete the worksheet. ➢ Give a two minute time warning before ending activity.	15 min
3. Debrief: ➢ Check answers as a group. Elicit answers from learners and ask them to tally their total at the top. ***Learners must have an 80% or better to pass this activity***	5 min

➢ *If 80% is not reached, the learner must set up a time to review with the instructor.* **4. Practice Activity (Connect) - Listening to a Call** ➢ Facilitator will play a recording of five more calls of customer dialogues with operators. Learners will listen to each call and identify keywords to search for the product. When the learner has the information on the screen, they should raise their hand immediately. ➢ Facilitator will use a stopwatch to time from the moment the customer in the call gives their description of the product (this time there will not be an exact title or ID). Visually check to see who has the correct information pulled up on their screen after their hand is raised. **5. Debrief:** ➢ Reveal answers and clarify any questions about the process of keyword searching. ➢ Reflection - Think, Pair, Share: Learners work in pairs to reflect on the questions below (Slide 10) for 5 minutes and then share thoughts as a group. Give a two minute warning before bringing the group back together and leading a discussion / scribing responses. ○ *What are some good clarifying questions, statements or strategies operators can use to gain more information about an item?* ○ *How can you "buy more time" politely if you need it?* ○ *What is the longest you feel is okay for a customer to wait on hold?* ○ *What is the protocol in place if you can't find the item a customer is looking for?*	10 min 20 min

Total time for EO #2:	**1 hour**

Enabling Objective #3: Effectively communicate product information to customer.	
1. Introduction (Absorb): *" Now you've demonstrated that you can effectively search for the products customers ask for. But can you effectively <u>communicate</u> that product information to the customer? We are going to work with new products to practice this important skill."* ➢ Learners will also watch a video that demonstrates best practices in effective communication of product information. ➢ Learners will be given 10 minutes to explore the new products offered by clicking on the section of the database called "New Products" and reading product descriptions. Instruct learners to think about what keywords would be associated with each, and what information would be important to convey to a customer.	15 min
2. Practice Activity (Do): New Product "Jeopardy" < Quiz link> ➢ Facilitator acts as game show host as learners work in teams to answer questions about new products. Winning team gets five dollar gift cards to Starbucks. ***Rules/Notes***: ● Learners cannot use the "New Products" section of the database, but are allowed to use the search functions they have learned. ● For the purposes of this practice, learners should not form answers as questions since they are simulating real situations. ● On each team, learners must alternate allowing each person to be the team "speaker" who answers questions so that all learners have a chance to demonstrate ability to effectively communicate product information.	30 min

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3. Debrief - Group discussion:

- *What similarities are there between this game and being an operator at work? What skills are needed to be successful in both?*
- *Which three new products do you think will be the best sellers this year? Why?*

4. Practice Activity (Connect) - Customer Role Plays

"You've demonstrated your ability to listen for the right information, search on the database and effectively communicate product knowledge. Now let's put it all together in a role play to make it more realistic. This activity will help you practice your product knowledge and communication skills on the spot. It gives you a chance to work on strategies for when things aren't perfectly clear or don't go as planned. The more you practice, the more likely you are to feel ready when talking to customers at work."

➢ Learners will work in groups of three. Sitting back to back, pairs will roleplay their side of the interaction written on their handout while the third observes with a rubric **(Handout 5)**.

Example:

<u>Person A - Customer:</u>
You are calling because you want to order three items that you saw in the catalog, but you can't find the catalog. You remember what the items look like and can describe them (choose three new products to describe without IDs)

<u>Person B - Operator:</u>
Listen to the call and effectively search for the item within 20 seconds, communicate the product information and take the order.

<u>Person C - Observer:</u>
Use the rubric to evaluate the operator. Evaluate for timeliness, product knowledge, correct protocol and politeness.

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5 min

30 min

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➢ After each role play, observer gives feedback to the operator. Learners indicate they are finished with that round and facilitator will pass out a new scenario sheet to each participant in the group. Be available to learners with any questions by walking around. **5. Debrief:** Sticky Questions ➢ Write the following questions on sticky flip chart paper. Post them around the room and ask learners to walk around and write replies to each. After 10 minutes, come together to discuss answers as a group. Sticky questions: ○ *What one word comes to mind when you think about how this activity made you feel?* ○ *What did you learn from watching others perform their role plays?* ○ *As the operator, what did you enjoy about interacting with your "customer?"* ○ *As the customer, how did you feel while you were trying to explain the products you didn't have ID's for?* ○ *What was the hardest thing about the roleplay?*	20 min
Break	**20 min**
Total time for EO #3 with break	**2 hours**

Terminal Objective 2: **Given a customer service scenario, learners will be able to correctly identify and demonstrate the correct strategy for action.**	
Enabling Objective 1: Demonstrate the ability to identify the correct and incorrect strategies in a practice scenario with the help of a partner.	
Activities and Methods	**Time Estimate**
1. Introduction ➢ Review Terminal Objective 1 and what was learned in previous training. ➢ Overview of this part of the training	10 min
2. View Operator Scenario Training Videos *"I want you to pay attention to the good AND bad in these videos. What was done well? What could be changed?"* ➢ Training Video #1- more good than bad behavior ➢ Training Video #2- more bad than good behavior ➢ Training Video #3- equal good and bad behavior	15 min
3. Group Discussion/Q&A *"Think about how you approach your calls. Do you recognize any of the actions that came about in the video? Let's discuss what happened."* ➢ Discuss what was seen in the videos. *Do you agree disagree? Why/why not?*	20 min

BREAK	**5 min**

4. Reading your own transcripts (Do Activity) ➢ Instructor reads a sample transcript and demonstrates how to approach the review. *"While you read through your transcripts, try to look at them as if they were someone else. Imagine they were the anonymous operators from the training videos."* ➢ Learners will have 5 transcripts of their own calls. They will be reading and taking notes. ➢ Learners will use the Transcript Activity Sheet to mark down what was done right and wrong in each of their calls. ***Learners must have an 80% or better to pass this activity**** *If 80% is not reached, the learner must set up a time to review with the instructor.*	30 min
5. Partner Scenarios (Connect Activity) ➢ Introduce Activity: *"In this activity you will be working with a partner. Each of you will take turns being the operator and the customer (2 times each or time permitting). As the customer, you will try to test the operator (your partner). Don't take it easy on them, we want to practice some of the things we learned.* ➢ Allow the learners to work with their partners in these scenarios of their own creation. Walk around the room and encourage the learners. **6. Complete Self-Assessment** *"Now it is time to complete a self-assessment of the work you have done so far. Answer the questions on the sheet as honestly as possible. The goal is for you to reflect on this portion of the training and decide how you feel that you are progressing."* ➢ Learners complete the self-assessment	20 min 15 min
Total time for Objective 1	**1 hr 55 min**
Break	**15 min**
Enabling Objective 2: Identify why certain strategies are incorrect.	

1. Customer Feedback (Absorb Activity) *"Now we are going to listen to some real customer feedback. This feedback will focus on the specific strategy that was taken by the operator and why the customer was unhappy about it"* **2. Read the Feedback** *Instructor will read the feedback. After each reading, try to get get a response from one or two of the learners. Do not agree or disagree with their response. Just try to get them talking about it. Try to get through as many pieces of feedback as time will permit (at least 5)* **3. Debrief** *"How did you feel listening to that feedback? Does any of that sound like experiences that you have had?*	5 min 15 min 10 min
4. Small Group Conference (Do Activity) *Learners will confer with the group members sitting at their table. Instruct them to discuss the good and bad of the feedback. When discussing the bad, instruct learners to brainstorm on a better approach for the situation.* **5. Brainstorming Conference** **6. Debrief** *Bring the group back together and listen to the strategies that they came up with for the feedback. Try to pick one group per piece of feedback, unless someone feels strongly about sharing.*	5 min 15 min 15 min
7. Individual Call Assessment (Connect Activity) *"Now it is time for you to work on your own. You will be given one call to listen to at random. Each call will have at least one strategy that is wrong. Your job is to identify the strategy, explain why it is wrong, and suggest a better strategy. You will need to backup your choice with at least 2 pieces of reasoning. "* **8. Learners Assess** *Now is the time that they will be listening to the call. They will be writing down their thoughts and strategies. Be sure to stress that the learners backup their choices.* **9. Rubric** *Give learners the rubric to self-assess. Give them a chance to discuss this with the people at their tables.*	5 min 15 min 15 min

TOTAL TIME FOR OBJECTIVE 2	**1 hr 40 min**

LUNCH BREAK	**1 hr**
Enabling Objective 3: Properly identify the correct strategies on your own.	
1. Explanation for Final Assessment of Knowledge (Absorb Activity) *"You made it! Now it is time for you to test what you have learned. Each of you will be broken up into smaller groups with various members of the instructional team. You will be acting out 5 live call scenarios with a member of the instructional team. You will be the operator and the team member will be the customer. You will need to respond to a variety of different calls and choose the best strategy for action. You will be assessed on the rubric that is in front of you. You will need to identify the correct strategy and respond correctly to 4 out of 5 scenarios to successfully pass this assessment." -Be sure to ask if anyone has questions.* ****Learners/Instructional Team groups have been pre-assigned. See the binder for a list**** **2. Scenario Assessments (Connect Activity)** **3. Conclusion** *Inform learners that they will be notified within 5 business days about their results and feedback. The team will discuss any remediation (if needed) with supervisors. All recommendations will be made to the learner directly via email.* ****Be sure to give phone number/email to learners if there are follow-up questions and/or issues with the results and feedback.***	10 min 2 hours 10 min
BREAK – *1 HOUR INTO THE ABOVE ACTIVITY*	**10 MIN**
TOTAL TIME FOR OBJECTIVE 3	**2 hrs 30 min**