You Have the Power: Facilitator's Guide

Purpose of this Facilitator's Guide:

This guide was created to provide stand-alone script and presentation cues for the delivery of training to PJ Enterprises Customer Services Representatives. The guide provides you:

- Scripts were needed to elucidate specific concepts
- Cues where your own words may suffice to convey an idea
- Activity instructions and guidance to successfully assess the learning objectives
- Timelines and recommendations for training structure

Facilitators should become familiar with this guide prior to the training session and familiarize yourself with the scripts, activities, and timings of each. Additionally, facilitators should consider factors which cannot be predicted or planned for in the guide including:

- Learners' questions
- Unplanned responses to your questions
- Learner reactions to the training

While every effort has been made to cover all conceivable outcomes, facilitators should be prepared for unpredictable situations. The best practice is to stay patient and understanding with learners. Your tone during the training will greatly impact how the training is received.

Learning Environment:

- Training will occur on-site at PJ Enterprises in their conference room.
- Computers will be available to all participants.
- Computers will be set up to display the user-experience in which learners will be expected to work after the training is complete, grouped in pairs, and sufficiently spaced to allow for talking not to interrupt learning.
- Participants will sit in comfortable office chairs at tables of 4.
- An overhead video projection and a projection screen are built-in to the conference room.

Time Requirements

The entire training will take one 8-hour workday to complete. Customer Service Representatives (CSRs) should be allowed an entire, uninterrupted day to attend the training. The training is broken into 2-hour chunks with 30-minute breaks between each plus 30 minutes for lunch. When delivering this training, ensure that you are staying as close to schedule as possible. Learners will lose focus if you go too long. If it is discovered that you cannot complete the training in one day, break the training into two days.

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. Prepare 2 customer service representative managers to demo the new script for the group.
3. Prepare 2 customer service representative managers to feel ready to demo the new decision tree for the group.
4. Create a Mentimeter account if needed. Create a presentation using the Q&A format showing flowing grid responses. Let participants submit multiple times. (See https://www.menti.com/ntem9q5bf9 sample)

During Training

1. Maintain participant engagement to ensure active learning
2. Be a model of professional tone and communications styles
3. Ensure learners have all appropriate materials at the appropriate times
4. Give timely, specific, and relevant feedback to learners as they work through activities.
5. Ensure all learners are treated with respect and all questions are answered to the best of your ability.

After Training

1. Direct participants to complete the course survey
2. Have a brief discussion before participants leave
3. Ask for immediate feedback on what worked, what didn't, and what might be improved.
4. Follow up a week later with an email to participants to see if they had any further questions or feedback.

You Have the Power Workshop Objectives:

***Terminal Objective*:** Given a customer complaint that can be solved by a representative, the representative will follow PJ Enterprises' phone etiquette protocol of solving or deescalating the customer complaint 99% of the time.

Enabling Objectives:

- Follow the PJ Enterprises' phone etiquette checklist and script

- Given a customer complaint, identify the appropriate portion of the decision tree
- Execute the intervention indicated by the decision tree

Materials

This list represents all physical and digital materials that will be needed for the course ***Physical:***

- Decision Tree handouts
- Smartphone, tablet, or computer
- Roleplay cards
- Posterboard
- Pencils
- Pens
- Markers
- Notebooks
- End of course survey

Digital:

- Quizzes
- Assessments
- Flipgrid
- Mentimeter

INSTRUCTIONAL CONTENT:

Terminal Objective: Given a customer complaint that can be solved by a representative, the representative will follow PJ Enterprises' phone etiquette protocol of solving or deescalating the customer complaint 99% of the time.	
Enabling Objective 1: Follow the PJ Enterprises' phone etiquette checklist and script	
Activities and Methods	**Time Estimate**
Welcome, Introduction, & Warm-Up 1. *5 minutes for participants to get settled in seats.* 2. *Introduce yourself as a facilitator & give an overview of the purpose of the training series.* - Welcome to our second day of training on our new and improved processes for customer support. Our goal for this training series and our new processes is to empower you as customer service representatives with greater decision-making authority to support customers. We think this will result in a better experience for both	0:00-0:17 5 min 2 min

our staff and our customers. I am excited today to dig into some tools with you that will help make your job easier as you address customer complaints. 3. Warm-Up: To get us started for today, let's begin with what I'll call "Tales from the Phone Lines". - First, take 1 minute to think of the most difficult customer complaint you've ever experienced. Then, find a partner and share your experience. You will each have 2 minutes to share your story. Are there any questions before you have a minute to think of your customer complaint story? - *Set a timer. Prompt participants when it is time to switch.* - Would anyone like to share their story with the group? - Starting with these difficult (and sometimes funny!) experiences will help us with the rest of our training, which will focus on solving or deescalating challenging customer complaints.	 10 mins
<u>Objectives & Agenda Overview</u> 1. Take a moment to look at today's learning objectives and the agenda for today on the slide. 2. The first part of today's training will focus on our improved phone script and customer service checklist. Our next section will introduce a decision tree that will help you as a customer service representative see what actions you can take given your new authority to address customer complaints. Then, we will take a break for lunch. Finally, we will dig into each of the new interventions you can take to solve customer complaints and ensure you feel comfortable with the details of how to address these problems. 3. Any questions before we get started?	0:17-0:20 3 min
<u>Presentation of New Phone Script & Checklist</u> 1. *Pass out sample scripts.* 2. When we interviewed customer service representatives to revise our training, we heard how you felt the old phone script was mechanical and confusing. We are excited to share the new script with you, which went through an extensive review process with a focus group of representatives. There are two parts to our new process. First, a specific script we will all use to begin every call and respond to common customer needs so every customer has the same experience. Second, a phone etiquette checklist of what we should all do in every call.	0:20-1:00 1 min

3. Script: Let's do a quick demo of the script, followed by time for you to review it independently.	
a. 2 customer service supervisors demonstrate the new script.	
b. 10 minutes for participants to review the script independently.	4 min
c. 5 minutes to discuss with a partner: 1) What is different about this script compared to the old one? 2) What questions do you have?	10 min
d. 5 minutes for questions about the script	5 min
4. Phone etiquette checklist:	
a. Walk through slides with each piece of the checklist & define each checklist item	5 min
b. Are there any questions about the checklist?	10 min
5. Assessment:	
a. We are about to head to a break. Before you leave, on your **phone or laptop**, navigate to the link on the slide and take the quick **quiz about the checklist.** Our goal is for everyone to score 80%, you can retake it if you miss any questions.	5 min

BREAK	1:00-1:20 20 min
<u>Practical Exercise</u>	1:20-1:55
1. Pass out ***role play instructions cards*** *during the break.*	
2. Now it's time to practice! Review the role play instruction cards, which have information about a common customer scenario. You will have 5 minutes each to take turns being the customer and being the representative using the script. Are there any questions?	15 mins
a. *Set a timer and prompt participants to switch.*	
b. Are there any questions that came up as you tried out the script?	
3. Now you've practiced, let's test our knowledge of the new script. We will watch a video of a customer service representative using the script. With a partner, you will identify 5 things you think the customer service rep did right, and 1 that should be changed, and how to change it. We will watch the video twice.	
a. Play video twice (5 mins)	
b. Give partners 10 minutes to identify 5 items done correctly/1 item done incorrectly	5 min
c. Ask partners to share 1 of their answers until all 5 correct and 1 incorrect behavior are identified.	10 min
	5 min

Application of Knowledge	1:55-2:20
1. We are reaching the end of this section on our new checklist and script. Now, we want you to think about how to apply these new tools to your work. a. Find the partner you met with during the warm-up to share your "Tales from the Phone Lines". With your partner, discuss: What are situations you've experienced in the past where the new checklist and script would have been helpful? *b. Give 7 minutes for partner discussions.* c. What did you discuss? Are there any responses anyone would be willing to share with the group? d. Thank you for sharing your experiences. Our goal is that these new tools make supporting your customers easier.	10 mins
2. Assessment - We will use these last 15 minutes of this section for practice. We want each of you to record yourself using the script on the **tool "Flipgrid**." Our customer service supervisors will review your recording and give you feedback in your next 1:1, so that you can continue to make your use of the script feel natural and comfortable. We will have 15 minutes for everyone to record a Flipgrid. If you finish early, take some time to stretch before the next section.	15 mins
Total time for Objective 1	**2 hr. 20 min**
Enabling Objective 2: Given a customer complaint, identify the appropriate portion of the decision tree	

Presentation of Decision Tree	02:20-02:35
1. Display the **presentation slide** that introduces the decision tree.	
2. Here is a new tool for you to use when you are fielding a customer complaint. This tool is a decision tree, and it will remind you how to resolve some of the most common customer service complaints. Once you have heard and understood the customer complaint you can look at the decision tree and find that complaint on the tree. Then you can follow the decision tree prompts which will ask you yes or no questions regarding the complaint. Each of your answers will lead you to the next branch of the decision tree until you eventually find a recommended solution to the complaint.	5 min
3. Example: We will do an example as a group. a. *Pass a **copy of the decision tree** to each participant.* b. *Navigate to the example scenario slide and read the example complaint.*	10 min

c. *Using the slide as a reference, guide the customer service team through the decision tree for the example complaint.*	
<u>Practical Exercise</u> 1. *Pass out **roleplay instructions cards.*** 2. Now you will form partners for roleplaying. Your partner will prompt you with a common customer complaint and you can identify the complaint on the decision tree and then navigate through the decision tree questions to find the recommended resolution. I will tell you when your time is halfway over so that you can switch with your partner. 3. *Allow time for activity, at 20-minute mark ask the groups to switch roles.*	02:35-03:15 40 min
<u>Application of Knowledge</u> 1. Next, we will do an exercise using this **poster board** tacked to the wall: I'm going to choose five of you to write down a customer complaint on the poster. *2. Indicate the five chosen customer service representatives. Wait for each of them to write a complaint on the poster* *3.* Now I will ask a few of you to work each complaint through the decision tree. *a. Choose a person to respond to the first complaint, ask them to identify the proper place in the decision tree for this complaint and to summarize the process of using the tree to find the resolution for that complaint.* *b. Repeat for the other complaints listed on the poster board* 4. Assessment: We are about to head to a break. Before you go, on your **phone or laptop**, navigate to the link on the slide and take the quick **quiz about the decision tree.** Our goal is for everyone to score 80%, you can retake it if you miss any questions.	03:25- 04:20 15 min 35 min 15 min
BREAK	**20 min**

TOTAL TIME FOR OBJECTIVE 2	**2 hrs. 20 min**
Enabling Objective 3: Execute the intervention indicated by the decision tree	
<u>Demonstrate and discuss the use of the decision tree</u> 1. *Make sure the decision tree is still displayed. Display it again and freeze the screen. Log into **Mentimeter** and pull up your presentation (see sample: https://www.menti.com/ntem9q5bf9)* 2. Now, we are going to watch two of your colleagues using the decision tree. *Call the pre-determined CSR to the front and thank them.* 3. Please pull out your decision tree and using your **phone** or **laptop** log into *give Mentimeter code/QR code for Mentimeter*. As we go through this scenario, please post your questions and what you notice. Your comments will show up on the screen. 4. *Unfreeze the decision tree and pull up the live Mentimeter on the projector.* 5. *CSR pulls up two chairs facing away from each other (and the projection screen) to simulate a phone call and go through a sample call and decision tree with one playing the customer and the other a typical CSR.* 6. Let's thank ___ & ____ again for demonstrating the decision tree. *Clap & wait a bit.* Now, let's look at your comments and questions. 7. *Address any comments and questions. Let CSR know that any questions that you cannot answer will be referred to a manager and the manager will e-mail the answers.* <u>Complete the resolution process indicated by the decision tree for the top five customer complaints</u> 1. *CSR will be completing scenarios drawn from real-life customer calls that have been integrated into a computer program. CSRs will be logging into a program that will give them a multiple-choice test based on the top five customer complaints. These complaints will be presented in slightly different ways each time and CSR must choose the correct multiple-choice response based on the decision tree. Wrong responses will be drawn from both other parts of the decision tree and the way that things were previously done at the company. . There will be 8 questions drawn from a bank of 15 possible questions and we anticipate that they will take 4-6 minutes each to read and answer. The questions will be randomized by the program to reduce the risk of copying answers from neighbors .CSR will log into the quiz using their company credentials so that a record of attempts is kept.* 2. Now, you will have a chance to practice using the decision tree on your own. Please take only your copy of the decision tree and go to a computer. Using your company credentials, please log into the company training system. *Wait until everyone is logged in.* 3. Before you take this quiz, you will have a ten-minute break. When you come back, make sure that you have your copy of the decision tree on your computer, and I will give you further instructions.	2-5 minutes 3-5 minutes 10-15 minutes 15-20 minutes 15 minutes

4. *During the break, project the decision tree again and leave it there.*	
BREAK – *1 HOUR INTO THE ABOVE ACTIVITY*	**10 MIN**
<u>Complete the resolution process indicated by the decision tree for the top five customer complaints, cont.</u> 5. Welcome back. Please check to make sure that you are logged into the computer training system. *Allow some time.* 6. Before you start this quiz, you need to know that if you do not receive an 85% or better on this quiz, you will need to retake it. There are eight questions, so you will need to get at least seven of them correct. If you do not get 85% or better the second time, you will need to retake this course. So, please, take your time answering the questions and remember to reference your decision tree before making your answer choice. 7. I will be available to help with technical issues but cannot help you with the questions. If you finish and pass, you may gather your belongings quietly and leave. If you do not get at least an 85%, you will click on the Exit button at the end of the quiz and then immediately take the quiz again. 8. Now, please find the grey icon with a green tree labeled "Decision Tree" and click on it to begin your quiz. Good luck! *9. Allow CSR time to take the quiz. Circulate - watching for cheating, retakes, and questions.* *10. Those that pass the first time must leave the room to maintain a quiet atmosphere for those still testing.* *11. As CSRs finish, turn off all computers that are not being used. When everyone finishes, make sure to log off the presentation computer and leave the room clean and neat.*	10-15 minutes 30-48 minutes (with no retake) *Those that must retake will likely take longer than the hour allotted. However, retakes should be rare.*
TOTAL TIME FOR OBJECTIVE 3	**2 hrs. 10 min**
There is a ***confirmative assessment*** that will occur 3 – 6 months post-training. Either Sheena Perez or Judie Thompson will role-play with employees scoring ≤ average on the portion of the customer survey dealing with product knowledge. The role-play will consist of 20 scenario-based questions and the employee must score 18/20 correct (90%). As the head facilitator, you must ensure that the scenario questions are available to these two women.	

Unit Wrap Up Checklist

Instruct all participants to take a **copy of the end of course survey** as they leave, to be completed by each individual and then reviewed with their supervisor at the next 1:1.

Execution Phase Documents

Change Request Form

1.This change is requested by

Lindsey, PM Team

2.What is the reason for the change request?

This change is requested to improve the effectiveness of the customer service training.

3.What are the details of the requested change?

Based on the results of our six-month post instruction survey, the instruction could be more effective if it were to include a video demonstration of the PJ Enterprises customer service script. The survey results indicate that the customer service team struggled to implement the script even after the instruction. The instruction already includes a roleplay exercise for practicing the script, this change, if granted, would add a new component to the instruction prior to the roleplay exercise. The new component would include the airing of a prerecorded video demonstration of the script, performed by at least two people to portray a realistic example of the script's use. The addition of the demonstrative video will help the service team be more confident in applying the script during customer interactions and this will improve customer satisfaction.

4.What deliverables are impacted?

This change, if granted, would add a new milestone to the training deliverable of this project. There will also need to be adjustments to some of the other milestones surrounding this deliverable, such as the updating of the facilitator guide and training slide deck.

5.What are the risks if the change is granted?

This change will be somewhat costly in time and finances. The major risk to the schedule will be the extension of the project timeline to accommodate the planning and production of the video. The proposed project budget will also need to be extended to pay for the video production and material updates.

6.What are the risks if the change is denied?

There will be no improvement to the effectiveness of the customer service training. This means that customer service performance will not be optimized, and customer satisfaction may stagnate or decline.

7.What are the budget impacts of granting this change? (leave blank if unknown, can be finished by PM team)

The approximate cost:

1. Contract video production to a professional and reliable vendor: $5000
2. Update the facilitator guide and training slide deck: $500

8.What are the scheduling impacts of granting this change? (leave blank if unknown, can be finished by PM team)

The approximate timelines:

1. Video planning and production 1 week
2. Update facilitator guide and training slide deck 1 day