Lesson One: Introduction to Customer Service

1. Customer service is a relatively complex puzzle. While engaging customers, we are attempting to offer services in a manner that moves our customers in a positive way while holding customers accountable for their efforts in building a career. Our customers are critical to our success: each customer is a critical piece of the customer service puzzle. How you greet and engage each customer will be the difference between positive and negative customer service.

2. According to the dictionary, what is customer service? (select the best answer, slide 3)
   a. The assistance a company provides to individuals who buy products or use the company’s services
   b. The manner in which a company gives the customers what they want
   c. The ability of a customer to receive services using a public or private company
   d. The ability of a customer to receive services using a subsidy

3. When providing quality customer service, the key to making the puzzle come together is “__________”. (select the best answer, slide 3)
   a. Me
   b. You
   c. Them
   d. None of the above

Brain Break

1. What is customer service?
2. Is the definition of customer service positive or negative? □ Yes □ No
3. The key to helping a person have a positive or negative customer service experience is ________.
4. There are a variety of definitions for the terms “good customer service”. Not all definitions are the same because they focus on different measures as to what good customer service is. Slide 4 provides you three different ways that you can measure that a person has been provided a service in a positive manner. List those below
   a. Is good customer service measured by ________________________________? 
   b. Is good customer service measured by ________________________________? 
   c. Is good customer service measured by ________________________________? 

5. Think for a moment that you are interviewing for a job as a Customer Service Representative. You are asked by the interviewer, “what is good customer service?” To answer the question, you think back on a business where you received great customer service. Name a company where you received excellent customer service and describe why this service was exceptional. (slide 5) ________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________

6. Would you return to this business? (slide 5) ☐ Yes ☐ No If yes, describe why: ______
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
7. Good customer service is described on slide 6 as “engaging each customer in a manner that...” (select all that apply)
   a. meets the customer’s goals to get something really good
   b. meets the customer’s needs to the best of the company’s abilities
   c. is engaging and thoughtful
   d. ensures the customer leaves happy
   e. is useful and generous

8. Because the customer received “good” customer service, the customer will (select all appropriate answers, slide 6)
   a. Want to go to another store
   b. Want to return
   c. Tell others about his or her positive experience
   d. None of the above

9. The core of our business structure is to offer services to our customers. What is the first principle of positive customer service? (slide 7)
   a. Make our customers happy
   b. Customers should get what they want
   c. Customers are the focus of our business
   d. Customers are always right

10. Using slide 8, finish the statements below about key elements associated with the first principle of positive customer service, “our customers are...”
    a. Very __________________________
    b. Not __________________________
    c. Not __________________________
    d. Not __________________________
11. According to principle ___________, we have to know who our customers are. (slide 9)

12. Our customers include a variety of job seekers. Some of our job seekers are looking for work for the first time, while others have jobs and now want to start a _______. (slide 10)

13. Some of our job seekers have careers but access services through the One-Stop Career Centers because they want or are required to ______________ careers. Other job seekers are in careers and are trying to ______________ to the next level. (slide 10)

14. Regardless of the type of job seeker, all types of job seekers will need help ________ an effective _______ _________ .
   a. Why would a first time job seeker need help conducting an effective job search? (slide 11)  
      ____________________________________________________________________________  
      ____________________________________________________________________________  
      ____________________________________________________________________________
   b. Why would a career changer need help conducting an effective job search? (slide 11)  
      ____________________________________________________________________________  
      ____________________________________________________________________________  
      ____________________________________________________________________________
   c. Why would a person who has been working and now needs to find another job need help conducting an effective job search? (slide 11)  
      ____________________________________________________________________________  
      ____________________________________________________________________________  
      ____________________________________________________________________________

15. In addition to conducting effective job searches, our job seekers will also need help learning how to complete applications, what to say (or not say) during an __________, and understanding Labor __________ Information. (slide 11)

16. Are job seekers our only customers? □ Yes □ No (slides 12-13) If no, who else do we serve through the workforce system?  
   ____________________________________________________________________________  
   ____________________________________________________________________________

   4 | P a g e
17. Let’s move on to principle three. Principle three requires us to “appear ___________”. 

While this concept may be simple, it goes a long way with customers. Look at the two pictures above; who would you rather work with? (slide 14)

- The person on the left
- The person on the right

Why? 

a. Part of principle three of positive customer service is to ___________ and ___________ to the customer.

b. We must make sure that we are engaging the customer with a ___________ attitude, even if we are having a bad day. (slide 14)
Remember, the principles of customer service are provided to help you successfully engage customers as they approach you and you help move them through the workforce system. The final exam includes knowing the principles and details about the principles.

- What is principle one of positive customer service? _______________
  _______________
  _______________

- What is principle two of positive customer service? _______________
  _______________
  _______________

- What is principle three of positive customer service? _______________
  _______________
  _______________

- Do you remember the types of job seekers we serve? _______________
  _______________
  _______________
  _______________

- Do you know why it is important that we offer all types of job seekers information about how to look for work and brush up on job search skills? _______________
  _______________
  _______________
  _______________

- Fill in the blank: according to principle three, we must ensure we are engaging the customer with a __________ ________ even when we are having a bad day.
18. **Principle four** is controversial in nature: after all, why did the person come to our office if he does not want what we have to offer? Do not take it ___________. (slide 15)

19. When a customer does not want what you are offering, take a deep breath. Remember to engage ___________ customer at a ___________. (slide 15)

20. **Principle _________** is simple but important. It is not enough to appear friendly; you have to be ___________.

21. List five ways that you can be _____________ to customers. (slide 17)
   a. Greet ____________________________________________________________________________
   b. Use the customer’s _____________
   c. Do not answer the phone while _____________
   d. Do not eat or drink while ____________________________________________________________________________
   e. Listen and make sure ____________________________________________________________________________

22. **Principle six of positive customer service** is to use positive communication skills both when you are on the phone and when you are meeting with the customer in person. Slide 19 provides methods for using positive communication skills. Make sure that you
   a. Greet the customers with a ____________
   b. Make sure that you speak ____________ and face the customers when you speak with them.
   c. Use every day, ____________ - ____________ language.
23. The customer cannot tell whether or not you are smiling on the phone: True or False (slide 19)

24. There are many ways that you can show that you are listening and paying attention to what the customer has to say. (slide 20)
   a. To use open body language, you must stand or sit with your legs crossed: True or False
   b. Do not use eye contact, this shows aggression: True or False
   c. Make sure you are not thinking about what to say next instead of offering your full attention: True or False
   d. It is appropriate to want to share our perspective. Therefore, it is alright to interrupt the customer: True or False
   e. Show that you are engaged through positive reactions: True or False

25. **Principle six of positive customer service** is focused on showing our customers positive c__________________ skills. Staying free of ____________ and ____________ attention to the customer is a positive ________________ skill. Most people can do more than one thing at a time, but working on other work or focusing on other people during a conversation is not a ________________ method of communication. Why, “believe it or not, your customer knows if you are ________________ ________________“. (slide 21)

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**Brain Break**

Chris is a hard working and dedicated Workforce Investment Act (WIA) case manager. He has a lot of work to complete before he can leave for the day. He begins jotting down a list to make sure he does not forget anything. This is his morning routine. He does this each day before he meets with his clients. While writing, his telephone rings, and he picks it up without thinking. The customer on the other end starts talking about an issue, but Chris is still going through his list of “to-do” items for the day. What positive customer service principle is Chris violating?

________________________________________________________________________________________________________________________
________________________________________________________________________________________________________________________
________________________________________________________________________________________________________________________
________________________________________________________________________________________________________________________
Why does it matter? ____________________________________________________________
________________________________________________________________________________________________________________________
26. In today’s business community, we communicate with our customers using a variety of media. We talk to our customers in person, by phone and through text messages. We also leave messages for our customers on their phones and through other media, such as Twitter. When using such media, we need to be very careful about our communication techniques. A good rule to work by is to think, “________________________ ______________________________________________________________”. (slide 22)

27. Let’s focus on leaving phone messages. You can leave an informative message without disclosing any confidential information by keeping your messages emotion-free, _______, concise, _________ and _______. (slide 23)

28. You can use the same techniques when ________ a customer. When__________, make sure that you do not disclose any personal information. If someone looks at the phone, the person should see nothing more than a ______ message. (slide 24)

29. Principle seven of positive customer service requires you to give notice to __________ customers that you will be right with them. Ever been to a business that says “welcome” when you walk in the door? Ever been to a business where they mean it? The reality is, you will work with a variety of customers, and traffic in the One-Stop Career Center will ebb and flow. When you are working with one person and another person approaches or needs assistance, simply let the __________ customer know you will be right with him or her. What is the purpose of doing this? (slide 27)
   a. Purpose one: __________________________________________________________
   b. Purpose two: __________________________________________________________

30. Professional telephone etiquette is just as important as professional etiquette shown to customers who come to the One-Stop Career Center in person. (slide 28)
   a. If you need to leave the phone line, it is ___________ to give the caller the option of waiting or being called back. You might ask,” __________________________ __________________________ “?
b. If the caller chooses to hold, give a progress report every ________ seconds or so. This lets the caller know that he or she has not been disconnected or forgotten.

c. When you return to the line, thank the caller for waiting. Whenever you are going to leave the caller to help someone else, ________ ________ ________ and place the customer on hold.

31. What steps do you need to take if you are transferring a call? (slide 29)
   a. Step 1: Tell the ____________________________________________
   b. Step 2: Let the caller ____________________________________________
   c. Step 3: Give the customer a direct ____________________________________________
                          ____________________________________________
                          ____________________________________________

32. Principle eight requires us to pay attention to the customer’s needs and be ________ to those needs. (slide 30)

33. **Principle eight of positive customer service** recommends that staff members go the extra mile. Give some examples of going the extra mile: (slide 30) ______________________
                          ____________________________________________
                          ____________________________________________
                          ____________________________________________
                          ____________________________________________
                          ____________________________________________
                          ____________________________________________

34. **Principle nine of positive customer service** states that we should not make promises unless we plan on keeping them. Reliability is critical to a positive relationship. (slide 32)
   a. It is important to be “______ ________” to appointments and sessions.
   b. Being ________ shows that we are not reliable.

35. **Principle ten of positive customer service** states that we need to look for ways that we can __________________. (slide 33) This requires us to measure our success and find better ways to deliver services to our customers. There are a lot of ways to measure our _________________. We can simply ask customers. Some customers will not be comfortable with telling us exactly how they feel about the service they received.
Additionally, staff members simply do not have the time to ask all of the customers coming into the One-Stop Career Center about the service they received. Therefore, regional workforce boards conduct more formal _____________ to gain information about service delivery and customer ________________.

Remember, principles four through ten.

- What is principle four of positive customer service? ________________

- What is principle five of positive customer service? ________________

- What is principle six of positive customer service? ________________

- What is principle seven of positive customer service? ________________

- What is principle eight of positive customer service? ________________

- What is principle nine of positive customer service? ________________

- What is principle ten of positive customer service? ________________
1. We have all had to work with difficult customers. So, what are the key principles for engaging customers who are challenging while working in the workforce system?

2. There are a lot of _________ that can be used when dealing with difficult customers. Select the statements below that are true based on data found in slide 3. (select all that apply)
   a. Difficult customers are often expressing emotions, such as anger or frustration.
   b. The expression of these emotions creates situations that are difficult in nature.
   c. These situations need to be defused or managed.
   d. We do not need to show empathy or empower the customer to manage his or her decisions.
3. The ________________ of the word “difficult” is best described by one or more of the statements below: circle each statement that defines this term. (select all that apply, slide 4)
   a. Hard to understand or solve
   b. Hard to deal with
   c. Manageable but not easy
   d. Hard to please or satisfy
   e. Hard to persuade

4. **Step 1 in the process of dealing with difficult customers** is to __________________________. (slide 5)
   a. Why is it important to identify the customer as “difficult” or expressing emotions that make the customer hard to deal with? (slides 5 and 6) __________________________
      __________________________
      __________________________
      __________________________
      __________________________
      __________________________

5. If we jump right into the conversation or situation with an angry person, we may take the “emotional bait”. It is important for us to recognize the angry, sad or frustrated customer and to recognize that anger, sadness and frustration are simply ____________ (select the best answer from below, slide 6).
   a. Unacceptable
   b. Reality
   c. Acceptable
   d. Emotions

6. There are **two types** of “difficult” people. There are ____________ people, and there are ____________ people. (slide 7)
   a. **Aggressive customers** express their emotions______________.
      These emotions are often demonstrated in a ________________ manner. You know that these individuals are angry because you can hear verbal expressions, such as yelling. Sometimes, you can tell that they are angry, sad or ____________ through their ________________ behaviors. Often times, aggressive individuals use ____________ to express their emotions. These individuals can be
the scariest to deal with because we are not sure where they will put all of their energy. (slide 7)

b. While **passive customers** do not often express their emotions out loud, instead, you can tell by their ____________ ____________ that they are “difficult”. Passive individuals do not express their emotions out ____________. However, their body ____________ and facial ____________ give them away. When passive customers are angry or frustrated, they are closed off and ____________ ____________. While such individuals may not be loud, their expression of emotions will impact how we engage them. Passively expressive customers can be just as difficult. (slide 8)

7. Once you identify customers as angry or frustrated, you have to begin to understand the reason that they are expressing their emotions or being “difficult”. Sometimes the issue is related to what happened in the One-Stop Career Center, and sometimes it is not. What are some reasons that your customers may get angry and take it out on you? (select all that apply, slides 9-11)

   a. The customer is applying for benefits, and it is a long process.
   b. The customer has not been able to find a job.
   c. The customer waited thirty minutes to use a computer to apply for a job.
   d. The customer’s bus was late, and it took over an hour to get to the One-Stop Career Center.

8. There are many common reasons why a customer may become difficult. For example, the customer is tired, the customer is overwhelmed or the customer is defending his self-esteem. When issues arise, a customer who would otherwise be pleasant begins to react in a negative manner. You or your co-workers may be trying to help the customer, but the situation itself is bringing out emotions of hurt or anger. We have all taken our frustration out on someone else. This is a ____________ response to a ____________ situation. (slide 12)

   a. Primal, negative
   b. Sympathetic, normal
   c. Mental, bad
   d. None of the above

Robert Bacal states that hostile behavior is learned early on by all individuals. In fact, hostile behavior is how we learn to get what we want. Think about out. When we were hungry, we screamed: and, we got fed. When someone stole your toy, you yelled, threw things or hit them. This was a natural process of growing up. Until you learned to interact, primal instincts taught you “the squeaky wheel gets the grease”.

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9. Taking out our emotions or expressing our anger to others in an attempt to get what we want is a ______________ response to a negative situation. (select one, slide 12)
   a. Natural
   b. Closed
   c. Open
   d. Primal

10. Anger is expressed by people in the same way. In fact, if you work in customer service long enough, you begin to see patterns of behavior for all people. You learn that when people become difficult, it is all a part of them trying to get something that they want. As Mr. Robert Bacal states in his book, titled Defusing Hostile Customers Workbook, the major purpose of the difficult or angry customer is to ________________ ________________ (slide 13).

11. The angry customer wants to get something, and the customer is not sure at that point how to get what they want. The customer is also dealing with adrenaline and other behavior-impacting issues that prevent him or her from interacting in a controlled manner. As long as the difficult customer can get you to ________ to the situation, the negative interaction will continue to occur. (select one, slide 13)
   a. Interact
   b. React
   c. Think
   d. Yell

12. You need to understand that the difficult customer will try to _______________ you to react, using hostile or verbal attacks. (select one, slide 13)
   a. Tempt
   b. Bait
   c. Try
   d. Demand

13. **Step 2** requires you to ________________ ________________ ________________ (slide 14).
14. You are a human being who will want to react defensively. This is a natural response - to defend yourself. There is nothing wrong with this. However, if you ______________ instead of ______________, the negative exchange will continue. (slide 14)

15. **Step 3** requires that you ______________ ______________. (slide 15)

16. You are the voice of reason. A technique that you can use is to remember that the customer is not angry with you, the customer is angry at the situation. Dianne Berenbaum of *Communicco Limited* actually says to “______________________________ ________________”. Do not take their anger personally by taking a deep breath and applying **step 3**. (slide 15)

17. **Step 4** requires that you “seek clarification”. First, we should allow the customer to talk. Many customers will not be able to tell you what is bothering them without _____, which may require that you allow the customers to ___________ their frustration. (select one, slide 16)
   a. Emotions, yell
   b. Anger, cry
   c. Emotions, vent
   d. Sadness, vent

18. What is **active listening**? (slide 17) ________________

19. **Active listening** is “hearing to ________________ “. (slide 17)

20. **Active listening** takes (slide 17)
   e. F__________
   f. Eye ________________
   g. C______________
   h. Effective ________________ ________________
21. **Active listening** is not a ______________ experience. (slide 17)

22. During **active listening** (slide 18)
   a. Ask ______________
   b. Show __________ ________
   c. Summarize __________ ________

23. A technique that you should apply when talking to the customer is to avoid using certain “______ ______”. (slide 20) Write down examples of these types of words or phrases: ___

24. Once you have gained the customer’s confidence, you are in a better position for **step 5** of the process. **Step 5** is to _______ ______ _________ (slide 21).

25. If a solution cannot be reached with the customer, make sure to provide the customer with his or her __________ ________. (slide 21)

26. What can you do if the angry customer will not stop talking? (slide 21) ______________

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**Brain Break**

You are returning a sweater your relative bought for you. You do not like it. It is not a very handsome or pretty sweater and it itches horribly. You take it to the store. The person at the counter is polite but states, “I’m sorry, but we can’t take it back without the receipt”. It is an $80 sweater. And, you know that this relative worked hard to give you this gift. You do not want that money to go to waste. If anything, you would put it back on their card if you could not get store credit, but they won’t give you anything. After getting a host of excuses, the store associate states, “look, I can’t don anything. That is just store policy.” How does that make you feel? Does that solve the problem? Does that make it any better? Do you feel dismissed? Hot Words are called “Hot Words” because they make people angry...or

**HOT!**
27. What do you do if customers appear angry when you approach them? (slide 23)

[Blank lines]

28. What if the customer keeps getting louder, what strategy can you employ to help calm the customer down? (slide 23)

[Blank lines]

29. What if I feel myself getting angry, what can I do? (slide 25)

[Blank lines]
Remember the five steps of dealing with difficult customers. We created the five steps to break down this information in five easy steps to assist you with the exam. But the exam is only one part of the job. Helping customers is more important than the Tier One exam. Remembering to identify an angry customer, recognize your own feelings, remain calm, seek clarification, and resolve the issue is a great way to help customers move forward in a positive way! There are a lot of great techniques associated with each step. Download the additional study questions at the end of this module to help you study and learn this information more effectively.