

TRAINING LEADER'S GUIDE

**So HELP Me**

**Employee Edition**

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## THE VIDEO'S MESSAGE

“If you own the problem, you own the customer. If you lose the problem, you lose the customer.”

- *Customer Satisfaction is Worthless, Customer Loyalty is Priceless* by Jeffrey Gitomer



What do customers value most in customer service? Solving their problems. Recent research shows that handling customer problems quickly and correctly will retain or even build customer loyalty. Customers who don't get their problems solved will leave and not return.

This engaging video illustrates realistic customer service problems that can frustrate both customers and employees. The video provides solutions to these problems that satisfy everyone: the customer, the organization *and* the employee. These solutions include working with policy to solve problems, helping customers outside your department, actively listening, treating every customer as your own, and defining customer needs.

“So HELP Me” demonstrates employees giving the kind of service that turns dissatisfied people into loyal customers. As one customer service provider in the video says, “...at the end of the day it makes me feel like I'm doing something useful. Instead of adding to people's frustrations, I'm actually helping them out.”

## HOW TO USE THIS GUIDE



Before beginning your “So HELP Me” workshop, read through this guide. Take special note of the Preparing for the Workshop section. The Planning Considerations and Suggested Group Workshop will help you determine your workshop agenda.

Please note that you may present the graphic layouts, located at the end of this guide, on flip charts, overheads or computer video projection. These graphics are also included on the DVD version of this program in two forms: as a menu option that displays the graphics on your monitor, or as a PowerPoint document that can be copied onto a computer's hard drive and displayed from there.

The worksheets, Session Evaluation Form, and graphic layouts may be duplicated for use only in training sessions with the program.

## KEY TRAINING POINTS



### Five essentials for solving customer problems:

- **Work with policy to solve problems**  
Don't use policy to explain what you *can't* do; use policy to help people.
- **Take customers directly to what they need**  
When you can't help, take them to someone who can, even if it's outside your department.
- **Take the time to really listen**  
Treat each customer as an individual. Listen until you really hear what their problem is.
- **Treat every customer as your own customer**  
Work with the customer you're talking to. Don't hand customers off to someone else just because they're difficult.
- **Help customers define their needs**  
Help people figure out what they want. Guide them to solutions that meet their needs.

## TRAINING APPLICATIONS

### This program easily adapts to customer service workshops for:



- **All Customer Service Providers**, including sales associates, government employees, telephone customer service representatives and all other service professionals.

## PLANNING CONSIDERATIONS

1. **Know Your Audience**  
Understand the training needs of your audience and target your workshop accordingly.
2. **Determine Objectives**  
Considering your audience and the materials you will be using, decide on the objectives of your workshop.
3. **View Video**  
Watch the program. Note situations that relate directly to your audience.
4. **Prepare Environments**  
Reserve a comfortable room with easy access for viewing the video and for small and large group discussions.
5. **Prepare Materials**  
Use the Training Leader's Checklist to prepare flip charts and/or overheads and photocopy all participant handouts.
6. **Check All Presentation Equipment**  
Test all audio and visual equipment **well before** the training session begins. At the beginning of the session, make sure everyone can see and hear the presentation.
7. **Send Out Invitations to Participants**  
A sample letter is provided for your use. (page 6)

## TRAINING LEADER'S CHECKLIST

1. **Reserve an appropriate location with:**  
 Comfortable seating       Easy viewing of visuals  
 Good lighting               Adequate writing surface  
 Good acoustics               Accommodations for participants with disabilities
2. **Make sure all equipment is working by:**  
 Playing the video to make sure the player, monitor, and sound are all working  
 Checking overhead projector and any additional equipment
3. **Organize and prepare all materials, including:**  
 Training Leader's Guide       Overheads and/or flip charts  
 Paper and pencils               Worksheets photocopied for participants
4. **Any additional materials (list below):**  
\_\_\_\_\_

## SUGGESTED GROUP WORKSHOP



### For: 2 ½ -Hour Group Training Session

<b>Activity</b>	<b>Time</b>	<b>Page(s)</b>
<b>“So HELP Me” Discussion &amp; Worksheet</b>	<b>20 minutes</b>	<b>7-8</b>
<b>“What Customers Value” Discussion &amp; “Positive &amp; Negative Service” Worksheet</b>	<b>30 minutes</b>	<b>9-10</b>
<b>Video Presentation, Discussion &amp; “What’s the Toughest Part of Customer Service?” Worksheet</b>	<b>30 minutes</b>	<b>11-13</b>
<b>Break</b>	<b>10 minutes</b>	<b>—</b>
<b>“Own It” Discussion &amp; Worksheet</b>	<b>20 minutes</b>	<b>14-16</b>
<b>“Action Plan/Self Evaluation” Discussion &amp; Worksheet</b>	<b>30 minutes</b>	<b>17-19</b>
<b>Conclusion / Session Evaluation</b>	<b>10 minutes</b>	<b>20-21</b>

(These times are approximate and may vary depending on the size and responsiveness of your audience.)

## SAMPLE INVITATION TO WORKSHOP



This letter can be sent to your participants before the training session. You can customize it to fit your needs.

(Date)

To: (Participant's Name)

From: (Trainer's Name)

Re: "So HELP Me"

As a customer service provider (or sales associate...) within our organization, you are on the front line of customer service. You represent our organization to the customers, and it is up to you to satisfy them, solve their problems, and keep them coming back. We recognize that this can be difficult and frustrating at times, but it can also be rewarding.

On (insert date) at (insert time), we will hold a training session on 5 successful techniques for solving customer problems:

- Work with policy to solve problems
- Take customers directly to what they need
- Treat every customer as your own customer
- Take the time to really listen
- Help customers to define their needs

The video, "So HELP Me" along with the training session, will not only demonstrate techniques for solving customer problems but will make the customer service experience more satisfying to our customers and to you.

Please mark your calendar so you can attend this important training session.

Thank you!

## **“So HELP Me” WELCOME & DISCUSSION**



**Time Required:** ● 20 minutes

**Materials Needed:** ● Graphic #1 (page 22)  
● Graphic #2 (page 23)  
● “So HELP Me” Worksheet (page 8)

### **Reveal Graphic #1:**

**“So HELP Me”**

### **Welcome:**

Introduce yourself and welcome participants. Ask participants to introduce themselves and describe their job responsibilities.

### **Read or Paraphrase:**

This is a workshop about improving customer service. We will be considering some of the challenges of customer service and how best to handle them. You will learn techniques that will help you solve customer problems quickly and to their satisfaction. The video, “So HELP Me” along with the training session, will not only demonstrate techniques for solving customer problems but will also make the customer service experience more satisfying to our customers and to you.

### **Reveal Graphic #2 & Read:**

“The most important factor of a customer’s satisfaction was the quality of help they received.”

*- SPSS White Paper, “Using Satisfaction Surveys to Achieve a Competitive Advantage”*

### **Hand Out Worksheet and Explain:**

Ask participants to take a few minutes to consider this quotation, then complete the “So HELP Me” Worksheet.

### **Large Group Discussion:**

Ask participants to share some of the experiences described on their Worksheets. Encourage everyone to respond to the experiences others describe.

## “So HELP Me” WORKSHEET

“The most important factor of a customer’s satisfaction was the quality of help they received.”

- SPSS White Paper, “Using Satisfaction Surveys to Achieve a Competitive Advantage”

**Instructions:** Considering the quotation above, describe either one or both of the following situations:

1. Describe your best customer service experience, where you were either the customer or the provider. What did the customer service provider do to make this a great experience?

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2. Describe your worst customer service experience, either as a customer or as a provider. What did the customer service provider do wrong? What could he or she have done differently to improve the situation?

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## “WHAT CUSTOMERS VALUE ” EXERCISE & DISCUSSION



- Time Required:**
- 30 minutes
  - Graphic #3 (page 24)
- Materials Needed:**
- “Positive & Negative Service” Worksheet (page 10)
  - Graphic #4 (page 25)

### **Reveal Graphic #3 and Discuss the Following Quotations:**

Why customers leave: “70% of customers leave because of perceived rude or indifferent behavior by an employee.”

*- Rockefeller University data*

What customers value: “At the very top of their list were things like *people taking responsibility for me* and *people listening to me*.”

*- Fidelity Investments research in Wall Street Journal*

### **Hand Out Worksheet and Explain:**

You may wish to introduce the exercise by saying, “Although you are all customer service providers, you are also customers. On the Worksheet “Positive & Negative Service”, you will be considering , as a customer, what makes you angry *and* what you value.” Allow approximately 10 minutes for completion.

### **Reveal Graphic #4 (“Positive and Negative Service”) and Discuss:**

Using the flip chart or overhead, write down participants’ answers from their worksheets. Discuss the results, including the behaviors that they may exhibit in their own work. You may wish to guide the discussion towards the behaviors illustrated in the video they will be seeing:

<b>Positive</b>	<b>Negative</b>
Solves my problem with no excuses.	Hides behind policy / offers excuses instead of helping.
If they can’t help, takes me to someone who can.	Won’t / can’t answer questions outside their department. Points rather than taking me to the right place.
Takes time to really listen and understand my problem and solve it.	Won’t listen, jumps to conclusions, doesn’t understand or solve my problem
Sticks with me to solve my problem. Doesn’t transfer me or hand me off to someone without any explanation.	Transfers me from one person to another, doesn’t follow up.
Explains available options to me. Helps me find solutions I didn’t consider.	Dismisses me if I don’t know exactly what I want or need.

**“ POSITIVE & NEGATIVE SERVICE ” WORKSHEET**

**Instructions:**

- 1. Under the POSITIVE column, list specific behaviors of a customer service provider that you value.
- 2. Under the NEGATIVE column, list specific behaviors of a customer service provider that make you angry.

Positive	Negative

## VIDEO PRESENTATION & DISCUSSION



- Time Required:** ● 30 minutes: Video & Discussion
- Materials Needed:**
- Video – “So HELP Me”
  - Graphic #5 “What’s the Toughest Part of Customer Service?” (page 26)
  - “What’s the Toughest Part of Customer Service?” Worksheet (page 13)

### Explain Before Watching The Video:

Before watching the video, ask participants to write down what they consider to be the toughest part of customer service – what their customers do that is most frustrating. After watching the video, they will be given a worksheet to compare their thoughts to those of service workers in the video.

### Video Presentation:

You may want to introduce the video by saying, “The video we will be watching, “So HELP Me” demonstrates the many challenges faced by customer service providers and the right way and wrong way to handle them. Please note those situations that relate most directly to your own experiences.” Play the video.

### After the Video - Reveal Graphic #5:

#### **“What’s the Toughest Part of Customer Service?”**

**ALICIA:** “...when I’m just trying to do my job and they end up getting mad at me.”  
(Customers getting mad about company policy)

**FRED:** “...when customers expect me to know the answer to every question they have about everything.”

**GARY:** “The customers who frustrate me the most are the ones who haven’t got the foggiest idea in the world what they even want.”

**MELISSA:** “...the people who just call up and expect me to get them out of some tangled mess – just like that.”

**DON:** “The people who make me crazy are the ones who can’t seem to follow the most simple instructions.”

(more)

**Hand Out “What’s the Toughest Part of Customer Service?” Worksheet and Explain:**

Ask Participants to complete the worksheet, comparing their ideas with those in the video.

**Large Group Discussion:**

Discuss each of the “toughest parts” of customer service listed from the video. Ask participants to discuss similar issues they have. Then ask for “toughest parts” not listed in the video and discuss. You may conclude this discussion by noting that the remainder of the workshop will be focused on how to handle these tough problems so the customer is satisfied.

**Ask and Discuss:**

**Q: What did Alicia, the bank teller, do “wrong”?**

*She just kept quoting “policy” and apologizing, rather than working within policy to solve the customer’s problem.*

**Q: What was wrong with just pointing someone in the right direction of the department they needed in the hardware store?**

*Answers will vary, but the customer may feel lost and neglected.*

**Q: Why was the Motor Vehicle clerk unable to solve the customer’s problem?**

*He didn’t listen. He assumed he knew her problem, but he didn’t. As a result, he gave her wrong information.*

**Q: Why was the customer on the phone so angry with the representative?**

*He didn’t want to be transferred again; she made no attempt to help him.*

**Q: Why did the hotel meeting planner not want to deal with the two women at that time? What was wrong with his handling of the problem?**

*He felt they needed to work out some issues themselves before he could help them. The mistake was they needed his help to clarify their needs and make a decision.*

**Q: Which of the “wrong way” behaviors in the video are problems for you or your work group?**

*Answers will vary.*

## “WHAT’S THE TOUGHEST PART OF CUSTOMER SERVICE?” WORKSHEET

### **Instructions:**

Following are the answers to “What’s the toughest part of customer service?” given by the customer service workers in the video. Check off any that matched the ones you wrote before watching the video. Add your own comments to each point, relating it to your work experience.

**ALICIA:** “...when I’m just trying to do my job and they end up getting mad at me.” (Customers getting mad about company policy)

**Comments:** \_\_\_\_\_  
\_\_\_\_\_

**FRED:** “...when customers ... expect me to know the answer to every question they have about everything.”

**Comments:** \_\_\_\_\_  
\_\_\_\_\_

**GARY:** “The customers who frustrate me the most are the ones who haven’t got the foggiest idea in the world what they even want.”

**Comments:** \_\_\_\_\_  
\_\_\_\_\_

**MELISSA:** “...the people who just call up and expect me to get them out of some tangled mess – just like that.”

**Comments:** \_\_\_\_\_  
\_\_\_\_\_

**DON:** “The people who make me crazy are the ones who can’t seem to follow the most simple instructions.”

**Comments:** \_\_\_\_\_  
\_\_\_\_\_

**Add your own thoughts on the “toughest part” of customer service:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## “OWN IT” EXERCISE & DISCUSSION



- Time Required:** ● 20 minutes
- Materials Needed:** ● Graphic #6 (page 27)  
● “Own It” Worksheet (pages 15-16)

### **Reveal Graphic #6 and Discuss:**

“If you own the problem, you own the customer. If you lose the problem, you lose the customer.”

*- Customer Satisfaction is Worthless, Customer Loyalty is Priceless by Jeffrey Gitomer*

### **Hand Out “Own It” Worksheet and Explain:**

Explain that on this worksheet participants will be considering issues from the video that relate directly to their own work situation. They will have the opportunity to look at experiences with their customers where they might have done better. Have participants work individually or in small groups of 2 to 4 people.

### **Large Group Discussion:**

After everyone has completed the worksheet, encourage participants to share their “wrong way” experiences and how they might have done better. Ask all participants to suggest “right way” behaviors for each situation. You may wish to conclude with the idea that taking ownership or responsibility for the customer problem is the key to solving it.

## **“OWN IT” WORKSHEET**

**Instructions:** Choose TWO of the following five situations to answer and discuss. You may work individually or in small groups.

### **“IT’S POLICY, THERE’S NOTHING I CAN DO”**

1. Describe a situation when a customer was angry with you because of a company policy you felt obligated to enforce. Then think of an alternative way (or ways) you could have handled the situation to better satisfy the customer.

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### **“IT’S NOT MY DEPARTMENT”**

1. Describe a situation when a customer was angry or dissatisfied because you did not or could not answer a question about something outside your department. How could you have handled the situation better?

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**“OWN IT” WORKSHEET - continued**

**“I’VE HEARD THIS ALL BEFORE”**

3. Describe a situation when you may have given incorrect information because you didn’t take the time to listen. How could you have handled the situation better?

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**“LET ME TRANSFER YOU”**

4. Describe a situation when you transferred a frustrated customer to another representative when you could have helped that person yourself. Why did you do it? How could you have better helped the customer yourself?

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**“I’M HAPPY TO HELP, BUT...”**

5. Describe a situation when you had a customer who wasn’t sure what they wanted or needed and you basically dismissed him or her. How could you have helped that customer?

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## “ACTION PLAN / SELF EVALUATION” EXERCISE & DISCUSSION



**Time Required:** ● 30 minutes

**Materials Needed:** ● “Action Plan/Self Evaluation”  
Worksheet (pages 18-19)

### **Hand Out “Action Plan / Self Evaluation” Worksheet & Explain:**

Explain that this is the participants’ opportunity to consider the effectiveness of their own customer service practices and how they might improve.

### **Large Group Discussion:**

After everyone has completed the worksheet, ask which behaviors might be the most difficult for them to maintain. Why? You may also wish to ask participants to discuss what they learned from this exercise.

**“ ACTION PLAN / SELF EVALUATION ” WORKSHEET**

**Instructions:** On a scale of 1 to 5 (5 being the highest), rate yourself on the following behaviors:

<u>BEHAVIOR</u>	<u>RATING</u>
<ul style="list-style-type: none"> <li>• <b>WORK WITH POLICY TO HELP PEOPLE</b> You don't hide behind policy to explain what you <i>can't</i> do. You work within policy to solve customer problems.</li> </ul>	_____
<ul style="list-style-type: none"> <li>• <b>TAKE CUSTOMERS DIRECTLY TO WHAT THEY NEED</b> When you can't help, you take the customer to someone who can, even if it's outside your department.</li> </ul>	_____
<ul style="list-style-type: none"> <li>• <b>TAKE THE TIME TO REALLY LISTEN</b> You actively listen to people's problems and requests. You treat each customer as an individual and listen until you understand what their problem is.</li> </ul>	_____
<ul style="list-style-type: none"> <li>• <b>TREAT EVERY CUSTOMER AS YOUR CUSTOMER</b> You work with the customer you're talking to. You don't hand off (or transfer) customers to someone else just because they have a difficult problem.</li> </ul>	_____
<ul style="list-style-type: none"> <li>• <b>HELP CUSTOMERS DEFINE THEIR NEEDS</b> You help people figure out what they want. You guide them to solutions that meet their needs.</li> </ul>	_____
<ul style="list-style-type: none"> <li>• <b>ANOTHER BEHAVIOR YOU CONSIDER IMPORTANT</b> (optional)</li> </ul>	_____

Considering those behaviors where you rated yourself 3 or below, what has motivated you to behave as you currently do?

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(more)

**“ ACTION PLAN / SELF EVALUATION ” WORKSHEET - continued**

If there are behaviors you would like to change, what specific actions can you take to improve?

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What obstacles, if any, may prevent you from taking the above actions? How can you overcome those obstacles?

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What changes in your work experience can you predict (if any) as a result of these actions?

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## CONCLUSION / SESSION EVALUATION



**Time Required:** ● 10 minutes

**Materials Needed:** ● Graphic # 7 (page 28)  
● Session Evaluation Form (page 21)

### **Reveal Graphic #7 and Read:**

“The best guide to becoming a better service provider will come from you, yourself.”

*- It's Not My Department by Peter Glen*

### **Hand Out Session Evaluation Form & Conclusion:**

Ask participants for any final questions or comments. Thank your group for their participation, hand out Session Evaluation Forms, and ask participants to complete them before leaving.

## SESSION EVALUATION FORM

### **Instructions:**

Please circle the number that best describes your evaluation of the training session:

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Uncertain</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
This program clearly demonstrated the importance of taking responsibility for customer problems.	5	4	3	2	1
This program clearly demonstrated the behaviors necessary for effective customer service.	5	4	3	2	1
This program provided practical information I can use in my work situation.	5	4	3	2	1
The session was well organized.	5	4	3	2	1

The best part of the program was: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

The program could be improved by: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Additional comments: \_\_\_\_\_

\_\_\_\_\_

**So HELP Me**

**“The most important factor of a customer’s satisfaction was the quality of help they received.”**

- *SPSS White Paper, “Using Satisfaction Surveys to Achieve a Competitive Advantage”*

**Why customers leave: “70% of customers leave because of perceived rude or indifferent behavior by an employee.”**

*- Rockefeller University data*

**What customers value: “At the very top of their list were things like people taking responsibility for me and people listening to me.”**

*- Fidelity Investments research in Wall Street Journal*

# POSITIVE & NEGATIVE SERVICE

<b>Positive</b>	<b>Negative</b>

## **“WHAT’S THE TOUGHEST PART OF CUSTOMER SERVICE?”**

**ALICIA:** “...when I’m just trying to do my job and they end up getting mad at me.” (Customers getting mad about company policy)

**FRED:** “...when customers ... expect me to know the answer to every question they have about everything.”

**GARY:** “The customers who frustrate me the most are the ones who haven’t got the foggiest idea in the world what they even want.”

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*- Customer Satisfaction is Worthless, Customer Loyalty is Priceless by Jeffrey Gitomer*

**“The best guide to becoming a better service provider will come from you, yourself.”**

*- It's Not My Department by Peter Glen*

VIDEO VISIONS, INC.  
TEL: 800-929-3355  
TEL: 310-338-9620  
FAX: 310-338-9630  
[www.videovisions.net](http://www.videovisions.net)

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