

TRAINING LEADER'S GUIDE

**So**  
**HELP**  
**Me**

**Supervisor Edition**

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## THE VIDEO'S MESSAGE

“Great customer service thrives in an environment where employees are encouraged and supported.”

- “So HELP Me” (Supervisor Edition)



How do supervisors affect customer service? We all know that frontline service people directly impact customer satisfaction. But we don't often look at how much a supervisor's behavior influences the service a customer ultimately receives.

“So HELP Me” (Supervisor Edition) takes a fresh look at customer service by showing the direct connection between a supervisor's behavior and the way employees treat customers. When employees are listened to, respected, and encouraged, they will do the same for their customers. Supervisory behaviors that promote excellent service include: telling people what they're doing right, helping employees find solutions, focusing on people rather than numbers, empowering people to do their jobs, and turning mistakes into opportunities for growth.

“So HELP Me” (Supervisor Edition) demonstrates supervisory practices that facilitate excellent customer service. The result is not only a better service provider, but also a loyal and satisfied customer.

## HOW TO USE THIS GUIDE



Before beginning your “So HELP Me” (Supervisor Edition) 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 supervisory practices which promote excellent customer service:

- **Tell people what they're doing right**  
That good feeling will get passed on to your customers.
- **Help employees find solutions for customers**  
Take the time to help employees work within policy to solve customer problems.
- **Focus on people, rather than numbers**  
When employees feel that you care about them, they're far more motivated to care about your customers.
- **Empower people to do their jobs**  
Employees will feel that they have the responsibility – and the power – to solve customer problems themselves.
- **Turn mistakes into opportunities for growth**  
Dealing with mistakes privately is a perfect opportunity for individualized training.

## TRAINING APPLICATIONS

### This program easily adapts to SUPERVISORY AND MANAGEMENT TRAINING WORKSHOPS



- **New and Experienced Supervisors and Managers** in all Service Industries will benefit from this program.

## 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 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>“Encourage or Discourage?” Discussion &amp; Worksheet</b>	<b>30 minutes</b>	<b>9-10</b>
<b>Video Presentation Discussion</b>	<b>30 minutes</b>	<b>11-12</b>
<b>Break</b>	<b>10 minutes</b>	<b>—</b>
<b>“What Kind of Supervisor Are You?” Discussion &amp; Worksheet</b>	<b>20 minutes</b>	<b>13-15</b>
<b>“Action Plan/Self Evaluation” Discussion &amp; Worksheet</b>	<b>30 minutes</b>	<b>16-18</b>
<b>Conclusion / Session Evaluation</b>	<b>10 minutes</b>	<b>19-20</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 supervisor (or manager...) within our organization, you are responsible for frontline service providers. Your behavior towards your employees directly impacts their behavior towards our customers. It is especially important for you to recognize the effect you have on your work group and to put into practice those behaviors that will contribute to customer satisfaction.

On (insert date) at (insert time), we will hold a training session on 5 essential supervisory behaviors that facilitate excellent customer service:

- Tell people what they're doing right
- Help employees find solutions to customer problems
- Focus on people, rather than numbers
- Empower people to do their jobs
- Turn mistakes into opportunities for growth

The video, **"So HELP Me"** (Supervisor Edition), along with the training session, will not only demonstrate effective supervisory practices, but will result in more satisfied employees *and* customers.

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

Thank you!



- Time Required:** ● 20 minutes
- Materials Needed:** ● Graphic #1 (page 21)  
● Graphic #2 (page 22)  
● “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 supervising frontline service workers. We will be looking at the connection between a supervisor’s behavior and an employee’s treatment of customers. We will be considering behaviors that facilitate excellent service *and* those which do the opposite. The video, “**So HELP Me**” (Supervisor Edition), along with the training session, will not only demonstrate effective supervisory practices, but will help you better serve your customers *and* your employees.

**Reveal Graphic #2 & Read:**

What do effective service leaders do?

“...establish customer friendly policies and procedures.  
...empower their employees to solve customer problems.”

- *Service Recovery* by John Tschohl

**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

What do effective service leaders do?

“...establish customer friendly policies and procedures.

...empower their employees to solve customer problems.”

- *Service Recovery* by John Tschohl

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

1. Describe an experience you had, as a supervisor or a customer service provider, where you (or your supervisor) established customer **unfriendly** policies or procedures *or* disempowered employees, which resulted in a **negative** customer experience.

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2. Describe an experience you had, as a supervisor or a customer service provider, where you (or your supervisor) established customer friendly policies or procedures *or* empowered employees, which resulted in a **positive** customer experience.

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## “ENCOURAGE OR DISCOURAGE?” EXERCISE & DISCUSSION



- Time Required:** ● 30 minutes
- Materials Needed:** ● “Encourage or Discourage” Worksheet (page 10)
- Graphic #3 (page 23)
- Graphic #4 (page 24)

### **Reveal Graphic #3 and Discuss:**

“The first level of supervision in any...organization has a dramatic impact on employee performance and behavior.

Frontline supervisors are a main determinant of performance, retention, and morale.”

*-New Supervisor Training by John Jones and Chris Chen*

### **Hand Out Worksheet “Encourage or Discourage” and Explain:**

You may wish to introduce the exercise by saying, “As a person in a supervisory (or management) position, you should consider what behaviors encourage people to do their best work and, in contrast, what behaviors discourage them. Allow approximately 10 minutes for completion.

### **Reveal Graphic #4 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>Encourage</b>	<b>Discourage</b>
Tell people what they’re doing right. Notice and appreciate people’s efforts.	Tell people what they’re doing wrong. Focus on the negative.
Take the time to help people find solutions to problems.	Overemphasize policies and procedures.
Show people you care about them, not just their performance measurements.	Focus exclusively on numbers – performance measurements, time clocks, sales figures
Empower people to do their jobs.	Limit people’s responsibilities and authority to solve problems.
Turn mistakes into opportunities for growth.	Use mistakes as an example. Publicly embarrass people.

**“ENCOURAGE OR DISCOURAGE?” WORKSHEET**

**Instructions:**

1. Think of two (2) people in supervisory positions you have worked for, one who has encouraged you and one who has discouraged you.
2. Under the ENCOURAGE column, list specific behaviors of the person that inspired you to do your best work.
3. Under the DISCOURAGE column, list specific behaviors of the person that prevented you from doing your best.
4. List below each column the effects on you and your work.

	<b>ENCOURAGE</b>	<b>DISCOURAGE</b>
<b>BEHAVIORS:</b>		
<b>EFFECT ON YOU &amp; YOUR WORK:</b>		

## VIDEO PRESENTATION & DISCUSSION



- Time Required:** ● 30 minutes: Video & Discussion
- Materials Needed:** ● Video – “So HELP Me” (Supervisor Edition)

### Video Presentation:

You may want to introduce the video by saying, “The video we will be watching, “So HELP Me” (Supervisor Edition) demonstrates supervisory behaviors that facilitate excellent customer service *and* those which do the opposite. Please note those situations that relate most directly to your own experiences.” Play the video.

### After Watching the Video, Ask and Discuss:

**Q: How did the supervisor’s criticism of Fred, the hardware store associate, affect Fred’s behavior toward a customer?**

*The criticism made Fred angry and defensive, and he took those bad feelings out on the customer by being rude to her and not helping her.*

**Q: In the bank scenario, what did the supervisor do “right” in the end? How did this affect the bank customer?**

*Instead of just quoting policy, he took the time to help the teller find a solution to the customer’s problem, within bank policy. As a result, the customer was satisfied and no longer wanted to change banks.*

**Q: What’s effect did the supervisor’s focusing exclusively on performance numbers *and* his refusal to reconsider the vacation schedule have on the Motor Vehicle clerk? As a result, how did the clerk treat his customer?**

*He was demoralized and alienated; he showed his lack of interest in his job to his customer by not listening to her or helping her and telling her he didn’t want to be there.*

**Q: Why was it important for the supervisor to allow the phone rep to solve the customer problem herself?**

*She was capable of handling the problem and felt restricted when he first said he would handle it himself. By allowing her to do it, she took responsibility for solving the customer problem. That makes her a better service provider for the customers.*

(more)

**VIDEO PRESENTATION & DISCUSSION - continued**

**Q: What happens when you publicly embarrass someone who has made a mistake, as in the hotel scenario? How can mistakes instead be turned into positive experiences?**

*The person embarrassed feels humiliated, and the people watching are uncomfortable. The experience can be positive if you handle mistakes in private and use them as an opportunity for training,*

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

*Answers will vary.*

## “WHAT KIND OF SUPERVISOR ARE YOU?” EXERCISE & DISCUSSION



- Time Required:** ● 20 minutes
- Materials Needed:** ● Graphic #5 (page 25)  
● “What Kind of Supervisor Are You?” Worksheet (pages 14-15)

### **Reveal Graphic #5 and Discuss:**

“Great customer service thrives in an environment where employees are encouraged and supported.”

- *“So Help Me” Supervisor Edition*

### **Hand Out “What Kind of Supervisor Are You?” 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 look at experiences with their own employees and determine if their behavior was in the best interest of the employee and the customer. 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 experiences. If the experiences were ones where they didn’t do what was best, ask all participants to suggest improved behaviors for each situation. You may wish to conclude by reinforcing the idea that the way the supervisor treats the employee has a direct impact on the way that employee will treat the customer.

**“WHAT KIND OF SUPERVISOR ARE YOU?” WORKSHEET**

**Instructions:**

Following are five quotations from customer service employees in the video, describing the type of supervisor they want.

Choose any quotations that relate to your experiences with an employee. Describe a specific situation where you either did or did *not* behave as the quotation suggests. Explain how your behavior affected your employee and, if applicable, his or her customer.

**1. “I want a supervisor who actually notices and appreciates the effort I’m making.”**

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**2. “...a supervisor who stops what they’re doing and takes the time to help me figure out how to solve a customer’s problem.”**

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**3. “...a supervisor who doesn’t just see me as the guy at window number six. Somebody who cares about me.”**

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**“WHAT KIND OF SUPERVISOR ARE YOU?” WORKSHEET - continued**

4. **“...a supervisor who trusts me enough to get out of my way and let me do the best job I can.”**

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5. **“...a supervisor who respects my talents and who shows a real commitment to help me grow and get better and what I do.”**

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



**Time Required:** ● 30 minutes

**Materials Needed:** ● “Action Plan/Self Evaluation”  
Worksheet (pages 17-18)

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

Explain that this is the participants’ opportunity to consider the effectiveness of their own supervisory 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>
• TELL PEOPLE WHAT THEY'RE DOING RIGHT You focus on the positive rather than the negative.	_____
• HELP EMPLOYEES FIND SOLUTIONS FOR CUSTOMERS Rather than just quoting policy, you take the time to help employees work within policy to solve customer problems.	_____
• FOCUS ON PEOPLE, RATHER THAN NUMBERS You show people that you care about them as much as their performance measurements.	_____
• EMPOWER PEOPLE TO DO THEIR JOBS You give people the responsibility and the tools they need to solve customer problems.	_____
• TURN MISTAKES INTO OPPORTUNITIES FOR GROWTH You do not make public examples of people's mistakes. You deal with mistakes in private and use them to help people improve.	_____
• ANOTHER BEHAVIOR YOU CONSIDER IMPORTANT (optional)	_____

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 group 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 #6 (page 26)  
● Session Evaluation Form (page 20)

### **Reveal Graphic #6 and Read:**

“Customers call for one reason; they want help.”

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

“It’s up to *you* to help them help the customer.”

*- “So Help Me” Supervisor Edition*

### **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 impact of a supervisor's behavior on employee's treatment of customers.	5	4	3	2	1
This program clearly demonstrated the behaviors necessary for effective customer service supervision.	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**

## **What do effective service leaders do?**

**“...establish customer friendly policies and procedures.**

**...empower their employees to solve customer problems.”**

**- *Service Recovery* by John Tschohl**

**“The first level of supervision in any... organization has a dramatic impact on employee performance and behavior.**

**Frontline supervisors are a main determinant of performance, retention, and morale.”**

**- *New Supervisor Training* by John Jones and Chris Chen**

# ENCOURAGE OR DISCOURAGE?

	ENCOURAGE	DISCOURAGE
<b>BEHAVIORS:</b>		
<b>EFFECT ON YOU &amp; YOUR WORK:</b>		

**“Great customer service thrives in an environment where employees are encouraged and supported.”**

**- “So Help Me” *Supervisor Edition***

**“Customers call for one reason; they want help.”**

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

**“It’s up to *you* to help them help the customer.”**

**- “So HELP Me” *Supervisor Edition***





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