



Customer Care: Getting it Right E-learning Module

Developed by Professor Bernard Moss

Module Companion



Welcome to the Avenue Media Solutions e-learning module on

CUSTOMER CARE: GETTING IT RIGHT

This module companion e-book has been developed to serve as a study aid for people working through this e-learning module. It contains a general introduction about e-learning, followed by (i) pages laid out for the facilitation of taking notes as you work your way through the programme; and (ii) the exercises that form an important part of the learning programme.

Please note that this companion is for your personal use. However, if your employers have provided or funded this programme of learning for you they may ask you to produce evidence of your learning, in which case this document duly completed will stand you in good stead.

E-learning

We have the potential to learn in various ways – from attending face-to-face training events, reading books, articles, research reports and so on, watching a video or listening to an audio learning programme, supervision and reflective practice and from just doing our job or living our lives. Different people feel comfortable with different sources of learning and we all have our preferences. E-learning is not intended to replace any of the above ways of learning – and, indeed, often incorporates elements of them – but, rather, to complement and enhance our other learning opportunities.

The Avenue Learning Centre provides e-learning programmes (or ‘modules’) that are the equivalent of a full day’s continuous professional development. However, it is not necessary to complete the module in one day. They are designed in such a way that they can be completed in small doses. That is, you can dip into the programme for a while, then leave it to do other things and return to where you left off when you are ready.

Using the companion

This module companion has been prepared to help you get the most out of this *Customer Care: Getting it Right* programme. We suggest you use it in the following three ways:

- To make notes as you work your way through the programme. This is particularly important if you are going to be completing the course over more than a week or two, as it is very easy to lose your thread in between the times you spend on the programme. It is also important to make notes based on *your* understanding of the issues covered, not just a summary of the course presenter's approach, but a record of what it means for *you*, in your particular circumstances.
- To complete the exercises contained within the module. Some people may be tempted to skip the exercises and just skip on to the next part of the programme. However, this is a temptation that must be resisted, as the exercises are a key part of the learning because they give you an opportunity to digest the information given and to make sense of it in relation to your own circumstances and your own learning needs. They encourage you to think about the issues and to understand them in relation to your own situation – without this there will be little or no learning.
- To serve as an aide-memoire. It is very easy to forget important issues and points of learning. Having a set of notes that we can refer back to at a later date is therefore very wise and potentially very useful.

So, you will need a printed copy of this e-book alongside you as you work through the online programme. After you have completed each exercise you can then return to the main programme page online to move on to the next part of the module when you are ready

To begin you should now complete the preliminary exercise overleaf and then go back to the main programme page online to launch into your studies in earnest.

Preliminary Exercise

This exercise has been designed to encourage you to think about why you are studying this programme. Please jot down your thoughts in response to the following questions. Your notes will provide the context for your study and will help to focus your thoughts as you begin. They will also be useful to refer to after you have completed the programme, to see how you have progressed.

What are the particular demands of your job that require good customer care skills?

Are there particular situations that you find really difficult or challenging?

What do you hope to gain from this programme?

NOTES:

Lesson 1: Setting the scene

Exercise 1.1

Ask yourself the following questions arising from the Introduction, and jot down your thoughts in the space provided:

1. What 'messages' are given to the customer by the physical environment they encounter? (For example, how professional and welcoming is it?)
2. How does your environment compare with the setting portrayed in the video?
3. What struck you most about the receptionist's attitude in the two scenes you have watched on the video?

NOTES:

Lesson 2: Exploring our own experiences of being customers

VIDEO 2.1

Exercise 2.1

1. Think of an occasion when you have experienced *good* customer care. Write down how that made you feel.
2. Think of an occasion when you have experienced *poor* customer care. Write down how that made you feel.

Learning point: We hope that all the members of the public you deal with in your job will go away feeling that this has been a good, positive experience. That is your aim when delivering customer care!

VIDEO 2.2

Exercise 2.2

1. To what extent do you feel that your own customer care skills at work allow customers / patients / clients to go away feeling satisfied with how you have dealt with them?
2. What are the constraints you encounter?
3. What might you be able to do about these constraints to remove them, bypass them or reduce their impact?

NOTES:

Lesson 3: Meet and Greet

VIDEO 3.1

Exercise 3.1

The video has just invited you to think about different ways and different tones of voice you can use with the four basic words: *Can I help you?*

This is a light-hearted way of making an important point about the tone of voice we use when greeting people! You may want to try this out by yourself or with your family or friends, or perhaps with some colleagues at work.

Try also listening to colleagues to see what tone of voice they use ... and of course when you ring someone up as a customer yourself, how are you greeted?

This exercise can also be an ongoing *awareness-raising* activity: once you have got the point you will find yourself becoming increasingly aware of its importance. However, for now, we want you to make a note below of the impact different tones of voice have on you when you hear them. What is best practice from your point of view?

VIDEO 3.2

Exercise 3.2

This exercise asks you to think about some examples you have experienced of *meet and greet*.

First of all, think of some specific examples of excellent practice and then identify:

What happened?

What made this such a good experience?

Next, think of some specific examples of mediocre practice and then identify:

What happened?

What made this such a mediocre experience?

Finally, think of some specific examples of poor practice and then identify:

What happened?

What made this such a poor experience?

What does this consideration of the differences across excellent, mediocre and poor practice tell you about what makes for excellent, mediocre or poor practice?

Footnote: Have you thought about contacting these organisations to give them feedback as a result of your experience as a customer?

NOTES:

Lesson 4: Equality and Diversity

Video 4

Exercise 4.1

Equality is about treating people fairly and with respect, regardless of any differences. Diversity is about recognising that the fact that we are not all the same is a good thing – an asset to be capitalised upon, not a problem to be solved. However, many people become anxious in dealing with people whose background is different from their own and this can then result in a lower level of service. It is therefore important that – for the sake of high-quality customer care – we do not allow any discomfort about working with diverse groups of people to stop us from making them feel welcome and valued.

In the video you were given five tips for good practice in this area. This exercise is designed to help you think carefully about the implications of these for your own practice.

1. *Show respect, concern and warmth to everyone*

How do you show respect, concern and warmth in your work? Try to identify precisely what you do in specific concrete terms.

What might stop you doing these things in working with certain groups of people?

What could you do to make sure that you show respect, concern and warmth to *everyone*, not just to those you feel familiar or comfortable with?

2. *Beware of patronising*

What would you find patronising? Think of the specific types of language use that you are likely to find patronising.

How can you ensure that you do not do any of these in your customer care work (for example, in talking to older or disabled people)?

3. *Don't make assumptions*

Age, gender, culture, sexuality, disability, religion and other factors can mean that different people do not see the world in the same way. It is therefore important to make sure that you are not making assumptions about someone whose perspective on life is different from your own. When you are relating to someone whose background is different from your own, how can you stop yourself from making unwarranted assumptions? If you are not sure about this, talk to one or more colleagues and see what they think about this.

4. *Be prepared to learn about cultural differences*

You are not expected to be an expert in cultural diversity, but it is reasonable to expect you to know some basic facts about groups you are likely to be working with and to be prepared to find out more where needed. Where would you be able to find relevant information about cultural norms and how might you be able to check these out? Again, if you are not sure, talk to one or more colleagues and get their opinion.

5. *Apply the other lessons you have learned*

Relating to someone who is from a different background to ourselves can make us feel uncomfortable, and this, in turn, can mean that we lose sight of good practice (for example, by not smiling). We therefore need to make sure that we are able to keep our discomfort under control and allow ourselves to do our customer care effectively. Think carefully about what you would need to do avoid losing your focus. Make some notes below.

NOTES:

Lesson 5: Developing your telephone skills

VIDEO 5.1

Exercise 5.1

Please use the space below to jot down some thoughts about your own experience of telephone calls. For example:

1. When you are making a telephone call to an organisation, what puts you off?

2. What are your 'pet hates' when being spoken to on the telephone?

VIDEO 5.2

Exercise 5.2

Consider the following 'Golden Rules' and then answer the questions that follow:

The Golden Rules when answering the telephone

1. Answer the phone after the second or third ring
2. Remember to smile
3. Have a clear opening statement
4. Speak clearly; don't gabble
5. Thank them for ringing
6. If you promise to ring them back, don't forget to do it

Questions

1. What difference does it make to smile before you speak?
2. How clearly do you speak when you answer the phone? Do you gabble?
3. When it comes to having a clear statement, what is your organisation's house style?
4. How are you expected to answer? For example, what information about your organisation are you expected to give when introducing yourself?

5. Would your organisation be happy to adopt these Golden Rules?

6. What are the PROs and CONs of asking for the telephone to be answered in the same way by everyone?

Postscript: are there any issues arising from this exercise which you need to address personally or take to your manager?

VIDEO 5.3

Exercise 5.3

Watch each scenario in turn. After each one pause and reflect on what you have seen. Jot down below what you think are the issues being raised; how you would respond; and what good practice in customer care would be like in that situation.

Scenario 1: Freda Bailey

What are the issues?

How would you respond?

What would be good practice in a situation like this?

Scenario 2: Dealing with a distressed caller

What are the issues?

How would you respond?

What would be good practice in a situation like this?

Scenario 3: 'Does Jenny still work there?'

What are the issues?

How would you respond?

What would be good practice in a situation like this?

Scenario 4: Mr Sinderson

What are the issues?

How would you respond?

What would be good practice in a situation like this?

Scenario 5: Domestic violence

What are the issues?

How would you respond?

What would be good practice in a situation like this?

Scenario 6: Joanna Smith

What are the issues?

How would you respond?

What would be good practice in a situation like this?

When you have completed all six scenarios, answer the following questions:

1. What help and support are appropriate and available for colleagues in your organisation who have to deal with stressful telephone calls (or stressful face-to-face interviews)?
2. Are such help and support available? How can they be accessed?

Telephone Skills Scenarios Comments

These guidelines set out some of the issues and questions raised in each of the six scenarios you have watched on the video. There may be other issues and further questions which you need to add – please record these below and seek out an appropriate colleague in your organisation with whom these issues and questions can be raised.

Scenario 1: Freda Bailey

Issues involve confidentiality; how to maintain it without upsetting the person making the call; discussing ways in which information could be shared (e.g. if written permission has been gained).

Question: What is the appropriate way of dealing with confidentiality in your organisation? Are you fully aware of all the issues that might put you 'on the spot' with regards to dealing with confidentiality? Who is the person in your organisation you need to discuss this with?

Scenario 2: Dealing with a distressed caller

Issues around how to deal with distressed suicidal calls. These are never easy, but here are some golden rules to apply: try to keep the person talking, and try to get help to them. Use open question to encourage the person to keep talking. Find ways of alerting colleague(s) and explore ways of getting help to the person (e.g. the police). Can you find out where the person is? Try to avoid giving reassuring messages that make you feel better, but may not cut much ice with the caller (e.g. 'I'm sure things can't be that bad; I'm sure your family really care for you; things will get better').

Questions: 1) What are the protocols in your organisations for dealing with such calls?

2) What help and support are available to help you deal with the emotional upset that such calls can cause you?

NB In the first three scenarios it is important to stress that confidentiality is very important, and that if you begin to breach it even in the smallest way then the damage has been done. You therefore need to have a form of words ready for such situations, e.g. 'I'm very sorry but I'm not allowed to divulge personal information ...'.

Scenario 3: Does Jenny still work there?

Issues involve confidentiality and not giving out to members of the public personal details of employees etc.

Scenario 4: Mr Sinderson

Issues: there are different challenges here – how to deal politely but firmly with someone who can talk for Britain, perhaps feels lonely and goes on and on and on! What approaches do you think might work? How would you handle such a situation?

Scenario 5: Jean Edwards

Issues: domestic violence is an emotionally difficult issue to deal with, and requires great sensitivity. Sometimes we have to be more flexible and creative than usual in order to accommodate a woman's

needs to see, for example, a female professional. It is not always easy (or possible) to leave the safety of a refuge.

Scenario 6: Joanna Smith

Issues: organisations that do not keep to their promises, or deliver goods or services on time, can cause upset and frustration for the customer. Sometimes such delays are unavoidable, but what skills can or should you use when dealing with such situations?

VIDEO 5.4

NOTES:

Lesson 6: Hints and tips for best practice in customer care

VIDEO 6.1

Exercise 6.1

Please note down your responses to the following questions:

1. What are some of the pressures that can sometimes make it difficult for you to deliver good customer care?
2. What might help you to respond positively to the difficulties involved?
3. Who might be able to help you with this?

VIDEO 6.2

Exercise 6.2

In the video we heard about five tips for making our use of language appropriate for high-quality customer care. These are reproduced here with questions to help you consider how best to put the pointers into practice.

1. *Avoid language that stereotypes people or portrays them in an unduly negative light.*

We are constantly fed unhelpful stereotypes via the media, so we have to be careful not to allow them to how we relate to people. What stereotypes are you aware of in relation to the following groups:

- Older people
- Disabled people
- Young people with hoodies

How and why might stereotypes get in the way of high-quality customer care?

How can you ensure that you do not rely on stereotypes in your customer care work?

2. *Avoid language that dehumanises people or denies their individuality.*

This generally happens by using 'category' terms to refer to individuals – for example, referring to someone with a learning disability as 'they' – or groups of people ('the disabled' rather than disabled people or people with disabilities). It is important that every customer / patient / client / service user is treated as an individual in their own right, and so we need to be careful not to use terms that do not recognise their individuality and humanity. In your particular line of work what forms of language could potentially dehumanise or 'categorise' individuals?

3. *Be aware of the fact that some terms can be offensive.*

This is not simply a matter of avoiding obviously offensive terms. It involves recognising that discriminatory terms that can cause offence are often widely used (for example, referring to a person of Pakistani origin as a 'Paki'). We therefore have to be aware of how derogatory certain terms can be in certain circumstances. Can you identify any terms that may be used in your line of work that could be offensive to some people in some circumstances?

4. *Be aware of the significance of tone of voice.*

It is often the case that the words we use are not problematic in themselves, but the tone of voice which accompanies them is. Tone of voice can be patronising, dismissive, unwelcoming or even hostile. Think carefully about your own tone of voice. What makes the difference between a helpful tone of voice and an unhelpful one?

5. *Make sure that your body language is positive and not defensive.*

Our body language is a very powerful form of communication, so we have to make sure that it is conveying the messages we want it to. Consider the following aspects of body language and how you can make each one positive not defensive. Give examples of each in the space provided:

Smiling

Positive:

Defensive:

Body posture

Positive:

Defensive:

Eye contact

Positive:

Defensive:

Hand movements

Positive:

Defensive:

VIDEO 6.3

.

Exercise 6.3

Dealing with the pressures of the job

The video trigger material suggested some of the pressures that might 'get to you' in your job. These include 'internal pressures' such as difficulties and worries you may be experiencing in your own life, and also 'external pressures' which could arise as a direct result of how you are treated at work because of some of the *office politics*, or the challenging demands of customers/members of the public which are causing you 'grief'.

This exercise is in six parts. It is intended to be a mirror with which you can look carefully at yourself, and identify some of the pressures which affect you. What you choose to do about them is a separate, although very important issue. These can be challenging and sensitive issues to explore, so it is important that you take your time with this exercise in order to engage fully with the issues we raise.

Part One: Internal pressures

List some of the current pressures you may be experiencing.

How do they impact upon your performance at work? How do you deal with them?

Part Two: External pressures

List some of the external pressures, including any office politics, which may be affecting your performance.

How do they impact upon your performance at work? How do you deal with them?

Part Three: Handling the pressures

What do you need to do if any of the above pressures are beginning to 'get to you' and affect your performance?

Whom should you speak to?

Who has a duty of care towards you at work? What resources/facilities are there, at work or in the community, to support you and to enhance your resilience?

Learning point: You matter! And, if you bottle some things up and don't deal with them, you and your organisation will suffer. You owe it to yourself – and to your organisation – to find good ways through.

Part Four: Seeking out help, support and TLC

Think of a situation at work which you found difficult to deal with. Jot down the main points and the impact this had on you.

What help and support did you require? From whom? Did you seek it? If *yes*, how did this help at all? If *no*, what held you back?

What help and support would you expect from your manager/supervisor to help you deal with a difficult situation at work?

Part Five: Score your organisation

On a scale from 10 (excellent) down to 1 (very poor/non-existent), how would you rate the level of care and support given to you by your organisation if you have difficult and challenging situations to deal with?

10 9 8 7 6 5 4 3 2 1

What factors influence the score you have given?

Part Six: What next?

Are there any actions you need to take to help improve the situation you have explored through this exercise?

You may well have a lot of comments you need to make around these issues, some of which may need to be raised with your manager and/or supervisor at work

VIDEO 6.4

Exercise 6.4

Closed and open questions

Think of three situations where you might use a closed question.

1.

2.

3.

Think of three situations where an open question would be more appropriate.

1.

2.

3.

How would you summarise how you would decide whether to use an open or a closed question?

VIDEO 6.5

Exercise 6.5

Dealing with angry customers/members of the public

Please read the following guidelines and then answer the questions that follow.

Whatever your role in dealing with the public, having to face angry, perhaps even violent, members of the public is never easy. The first thing to stress is that the organisation you work for has a duty of care towards you, to do their very best to ensure that you have a safe and secure environment in which to work. This involves much more than having posters up to say that action will be taken against any members of the public who are abusive towards the staff. It also involves how offices and rooms are organised and set out, to allow a speedy and safe exit; it involves having 'panic buttons' (alarms) in case of emergency, and a team culture which always ensures that the safety of everyone is of paramount importance.

This does not mean, however, that everyone has to hide behind, or be protected by, glass screens! That can sometimes give the wrong messages about the organisation and its relationship with the public, although banks and some building societies insist on such measures.

The general guiding principles of good customer care when dealing with angry or aggressive members of the public are as follows:

1. *Ensure that you are safe.*
2. *Try to keep calm.* However much you may feel churned up inside, if you can keep calm you will help to defuse the situation;
3. *Listen attentively.* This is always important, but perhaps more so if the other person is feeling angry or upset. If the person feels you are taking them seriously and genuinely want to help, then this too will help to defuse the situation;
4. *Speak calmly: you are in charge.* It may not feel like it when the other person is shouting, but your calmness demonstrates your professionalism. A gentle smile while you speak may also help, but do avoid wide smiles or grins because that may feel that you are laughing at them;
5. *Don't overreact or get angry or defensive.* Remain professional throughout. There may well be genuine reasons why the person is angry, and if you can help them feel you are on their side and want to help them get things sorted, you will begin to defuse the situation.
6. *If possible, offer a side room to continue the discussion,* and bring in another colleague to support you. This is a matter of judgment of course: if you are in a busy, crowded waiting room you will want to find a quiet place to continue the discussion. It will help defuse the situation, and remove the heated encounter from the public gaze. It also gives you time to bring in another colleague to support you, and to give the angry person time to calm down.
7. *Take some time out afterwards.* However well you have handled it, such situations can be distressing. While you are dealing with it the adrenaline surge will help you get through, but afterwards you may feel like a chewed rag. The duty of care which your organisation owes you should extend to some TLC after the event, so that you can take some time out to recover. You also need to record the event in an appropriate place (in an incident book for example). This too will help you regain your equilibrium.

Footnote: There will be occasions when, in spite of your best endeavours, you have not been able to contain the situation or calm the person down. Sometimes people in mental distress, or under the influence of alcohol or drugs, can find it difficult to respond positively. On such occasions it is entirely appropriate to ring the police or your internal security service if you have one, and to make every effort to ensure the safety of everyone concerned.

1. Do these guidelines offer specific challenges for your organisation?
2. How easy or otherwise is it to put these into practice in your organisation?
3. Are there issues/difficulties you have encountered that have not been raised?
4. What support is available for staff who have had to deal with angry and aggressive customers?

Are there issues arising from this that you need to take further? If so, who is the most appropriate person to discuss them with in your organisation?

NOTES:

Lesson 7: Dealing with complaints

VIDEO 7.1

Exercise 7.1

You now have the opportunity to reflect on what you have learned from the video and accompanying materials, especially with its emphasis on using the words: *Thank you – Glad – Sorry – Sure*. Please write down your responses to the following questions:

1. What do you think it is that makes the *Thank you – Glad – Sorry – Sure* an effective approach? What would you find helpful if someone used it with you?
2. Can you think of a situation when you could have used this approach? How might it have helped?
3. If you have never used it, in what situations are you likely to be able to use it?

Exercise 7.2

If this approach is new to your organisation, how might you introduce this approach in your own workplace? To whom would you need to speak to raise these issues?

Dealing with Complaints

As a reminder for you, here are the ten key points for dealing with complaints outlined in the video:

1. Always put yourself in the other person's shoes
2. Listen attentively
3. Act promptly
4. Don't get into an angry exchange
5. Don't be defensive
6. Thank them
7. Reassure them
8. Don't promise anything you can't deliver
9. Further investigation may be needed
10. End it positively

NOTES:

Lesson 8: Conclusion: where do we go from here?

VIDEO 8.1

Exercise 8.1

Make a note of the main things you feel you have learned from completing this programme by answering the following questions:

1. In what ways do you feel your skills in customer care have been enhanced as a result of completing this programme?

2. Are there any outstanding issues which you need to take further? If so, to whom do you need to speak in your organisation about them?

The Avenue Learning Centre

Avenue Media Solutions, Avenue House, PO Box 2060, Wrexham, LL13 0ZG

www.avenuelearningcentre.co.uk

© Avenue Media Solutions 2013