Facilitator's Guide: *Best Practices for Providing Excellent Customer Service, Handling Difficult Situations, and Building Rapport with Customers*

Target Audience: Employees across departments who have direct or indirect interactions with customers

Learning Objectives:
1. Define the importance of excellent customer service in Anytown Company's success.
2. Identify best practices for providing exceptional customer service.
3. Write two strategies in handling difficult situations with customers effectively.
4. Apply techniques for building rapport and fostering positive relationships with customers.

Training Purpose:
The purpose of this training is to empower participants to deliver outstanding customer service experiences to meet the end of quarter goal of 95% positive feedback from customers, ultimately contributing to the overall success and growth of Anytown Company.

Materials / Equipment:
- Zoom Link
- Google Slides Deck
- Google Forms Quiz
- Participant Guide

Total Time: 60 Minutes

Link to Presentation Slide Deck:

https://drive.google.com/file/d/1S8FNThaWqUDoLanNXha35UMB1e72kJCu/view?usp=sharing
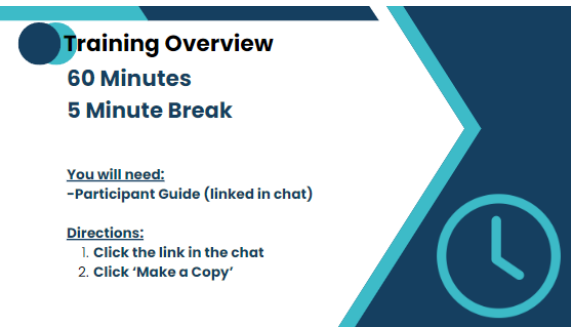
Link to Google Forms Quiz:
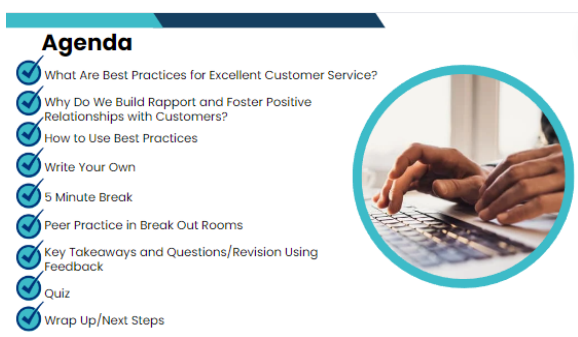
https://forms.gle/FYCQzyNv53Zuou2F6

Producer: Pre-Work	Actions
	1. Coordinate with the facilitator
2. Set up a Zoom link and test audio, video and screen sharing functionality
3. Record meeting when training begins
4. Set up 5 breakout rooms with 3-4 participants in each
5. Enable the waiting room in Zoom
6. Allow the facilitator to control the advancement of slides and share their screen
7. Prepare jamboard link to allow participants can edit
8. Set up Google Quiz sharing link to allow participants to fill in their information to submit their quiz as their formal assessment to the course
9. Set up the Participant's Guide link so each participant can download it and be prompted to make an editable PDF copy
10. Slide numbers for when links need to be posted in the chat:
a. #3: post Participant Guide link in the chat
b. #8: post Jamboard link in the chat
c. #17: open Breakout Rooms
d. #21: post Google Forms Quiz link
	Notes
	• Responsibilities include:
○ Breakout rooms
○ Jamboard links
○ Participant guide link
○ Google Forms Quiz link
○ Any technical troubleshooting

Facilitator: Pre-Work	Actions
	1. Familiarize yourself with Google Slides, the Facilitator guide, the Participant guide, Jamboard and the Google Forms Quiz
2. Talk to producer to determine how many breakout rooms are needed
3. Practice screen sharing and confirm audio and video functionality
	Notes
	• Log into the Zoom meeting 20 minutes prior to training
• Present the cover slide prior to allowing entry to participants

Training Outline: Session #1		
Slide(s)	**Approx. Time**	**Topic / Activity**
1-6	6 Minutes	Introduction, Overview, Objectives and Agenda
7-9	10 Minutes	What Are Best Practices for Excellent Customer Service? Activity
10-11	1 Minute	Why Do We Build Rapport and Foster Positive Relationships with Customers?
12-14	15 Minutes	Write Your Own Answers Activity How to Build Rapport and Foster Positive Relationships with Customers
15	5 Minutes	5 Minute Break
16-18	15 Minutes	Breakout Rooms: Different Scenarios - Peer Practice
19-20	6 Minutes	Key Takeaways and Questions/Revision Using Feedback
21	5 Minutes	Quiz
22	1 Minute	Summary
23	1 Minute	Wrap Up/Next Steps
Total Time	**60 Minutes**	

Detailed Guide

Slide Details	Slide Thumbnail	Facilitator Notes	Producer Notes
Slide 1 (1 min) Welcome		**SAY:** • Welcome to Best Practices for Providing Excellent Customer Service, Handling Difficult Situations, and Building Rapport with Customers • Let's meet the team • I am Matthew Graham and I will be facilitating the training today • I am the customer service consultation expert • I have 18+ years of experience in this field • I have facilitated about 140 virtual sessions • This is Melanie Hall • She will be our producer today • She is our technology expert and will be available to answer any questions that you may have or about any technical issues that arise • Please post in the chat any time if you need help as Melanie will be monitoring it and be able to answer your questions during the training • On behalf of myself and Melanie, we are glad to have you with us today and thank you so much for being here **DO:** • Introduce yourself and the producer • Advance the slide after 1 minute	**DO:** • Admit participants when they enter the waiting room • Say hello when introduced by the facilitator • Monitor the chat for questions from the participants regarding any technical issues

Slide 2 (1 min) Meet the Team		**SAY:** - Let's meet the team **DO:** - Introduce yourself and the producer	**DO:** - Monitor the chat and answer any technical questions - Say hello when introduced - Prepare to place link to the participant guide in the chat during the next slide
Slide 3 (1 min) Training Overview		**SAY:** - Our training will last 60 minutes today and we will have a 5 minute break halfway through - For today's session you will need the participant guide linked in the chat - Please click the link and make a copy of the guide now - Please unmute to let the producer know if you are having any issues accessing the link or making a copy of the guide - Click on the thumbs up icon under the directions at the bottom of your screen or you can type "Yes" when you have successfully made a copy of the guide **DO:** - Wait 1 minute for participants to click the link in the chat and make a copy of the guide	**DO:** - Post link in the chat when the facilitator references it - Monitor the chat for any technical issues from the participants

Slide 4 (1 min) Best Practices for Session		**SAY:** ● Let's go over best practices for our session today ● Please keep your microphone muted unless you are addressing the group ● Please work collaboratively ● Please join breakout rooms and participate in the activities during the session today **DO:** ● Answer any questions participants may have about best practices for this session	**DO:** ● Monitor the chat and participants for any technical issues or questions
Slide 5 (1 min) Learning Objectives		**SAY:** ● During today's session we will focus on these objectives **DO:** ● Read the displayed objectives	**DO:** ● Monitor the chat and participants for any technical issues or questions
Slide 6 (1 min) Agenda		**SAY:** ● This will be our agenda for today's session ● We will return to this slide throughout the training to make sure we are on task **DO:** ● Read the topics on the agenda	**DO:** ● Monitor the chat and participants for any technical issues or questions

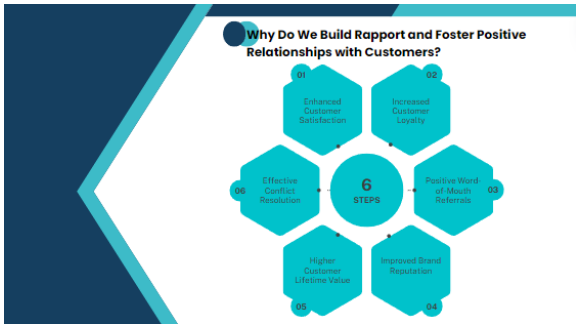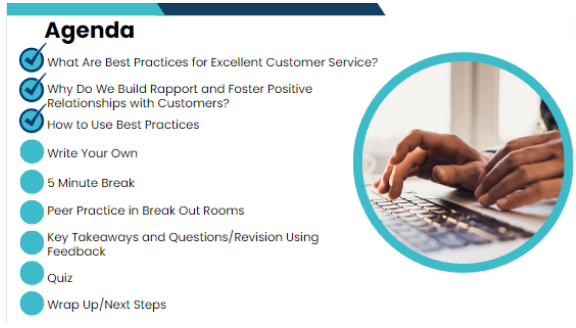| Slide 7 (3 min) What Are Best Practices for Excellent Customer Service?		**SAY:** • Before we get started on best practices for excellent customer service, let's talk about what providing excellent customer service means • Excellent customer service looks different because all problems that arise are different • Best practices include active listening, effective communication, body language, personalized interactions, empathy and understanding and follow-up and relationship maintenance. Take about 2 minutes to read over these. • Are there any questions before we continue? **DO:** • Give participants 2 minutes before going to the next slide.	**DO:** • Monitor the chat and participants for any technical issues or questions
Slide 8 (5 min) Activity 1		**SAY:** • Since we have reviewed what best practices for excellent customer service are, you will brainstorm reasons why you think these practices are important. • There will be two parts to this activity. First, think of as many reasons as you can to answer the question "Why Do You Think Excellent Customer Service is Important?". Then pick two to share with the group using the Jamboard link in the chat. Copy and paste from your participant guide onto the jamboard. Remember these will be anonymous. • We have five minutes for this	**DO:** • Post the Jamboard link in the chat when the facilitator references it • Monitor the chat and participants for any technical issues

| | | activity.

DO:
- At minute 3, present the jamboard
- At minute 4, read any responses on the jamboard | |
|---|---|---|---|
| **Slide 9 (1 min)**
Agenda | | **SAY:**
- Thank you for brainstorming and adding your experiences to the jamboard
- Let's get into How We Build Rapport and Foster Positive Relationships with Customers | **DO:**
- Monitor the chat and participants for any technical issues |
| **Slide 10 (1 min)**
Why Do We Build Rapport and Foster Positive Relationships with Customers? | | **SAY:**
- Let's talk about why we should build rapport and foster positive relationships with our customers
- This image is in your participant guide to reference during and after this training
- 1. Enhanced Customer Satisfaction: Building rapport with customers leads to positive interactions, making them feel valued and understood.
- 2. Increased Customer Loyalty: Customers are more likely to remain loyal to a business that they have a positive relationship with.
- 3. Positive Word-of-Mouth Referrals: Satisfied customers are more likely to recommend your business to friends, family, and colleagues.
- 4. Improved Brand Reputation: Positive interactions and | **DO:**
- Monitor the chat and participants for any technical issues |

		relationships with customers contribute to a favorable brand reputation. ● 5. Higher Customer Lifetime Value: Building rapport and fostering positive relationships can increase the lifetime value of a customer. ● 6. Effective Conflict Resolution: When challenges or issues arise, a strong rapport with customers can facilitate more effective conflict resolution. ● By prioritizing the building of rapport and fostering positive relationships with customers, businesses can create a foundation for long-term success, growth, and sustainability. **DO:** ● Read each section and corresponding examples ● Reference the participant guide	
Slide 11 (1 min) Agenda	**Agenda** ☑ What Are Best Practices for Excellent Customer Service? ☑ Why Do We Build Rapport and Foster Positive Relationships with Customers? ☑ How to Use Best Practices ◯ Write Your Own ◯ 5 Minute Break ◯ Peer Practice in Break Out Rooms ◯ Key Takeaways and Questions/Revision Using Feedback ◯ Quiz ◯ Wrap Up/Next Steps	**SAY:** ● Let's talk about how to use these best practices	**DO:** ● Monitor the chat and participants for any technical issues

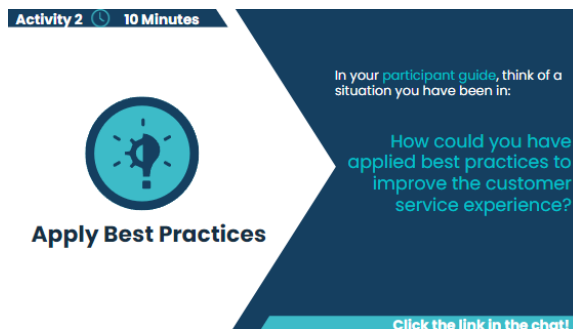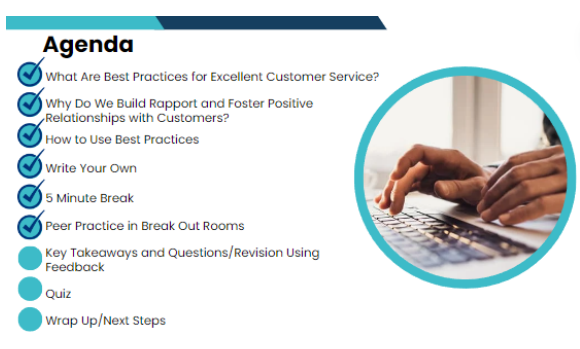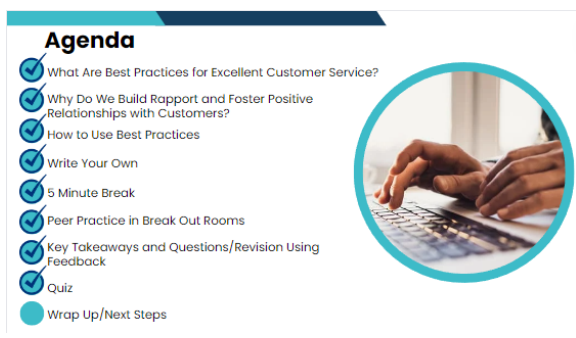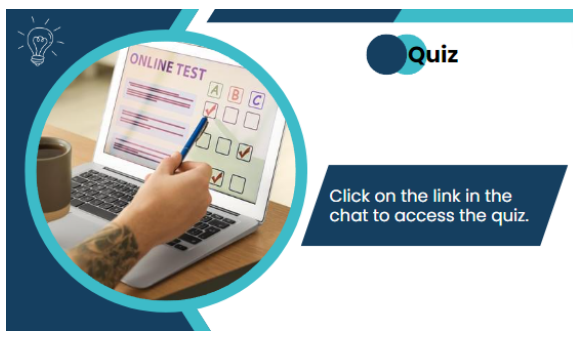| Slide 12 (3 min) How to Use Best Practices in Scenarios | How to Use Best Practices | **SAY:**
• Refer to best practices to help guide you through these scenarios
• *"A customer is upset because their product arrived damaged, and they need a replacement urgently."*
• Use best practices to help guide you through these scenarios
• *"A customer is frustrated because they have been put on hold for a long time and haven't been able to speak with a representative."*
• Use best practices to help guide you through these scenarios
• *"A customer requests a refund for a product they purchased several months ago, citing dissatisfaction with its performance."*

DO:
• Encourage participants to answer in the chat and explain how they would handle these scenarios using best practices.
• Refer back to best practices if needed to keep participants on target. | **DO:**
• Monitor the chat and participants for any technical issues |
| Slide 13 (10 min) Activity 2 | **Apply Best Practices** | **SAY:**
• Now we will apply these best practices to enhance customer service
• In your participant guide write down how you could apply the best practices to a situation you have experienced to make the customer service excellent
• Please be concise and write a maximum of 4 sentences for your response
• Please do not overthink, we will | **DO:**
• Monitor the chat and participants for any technical issues |
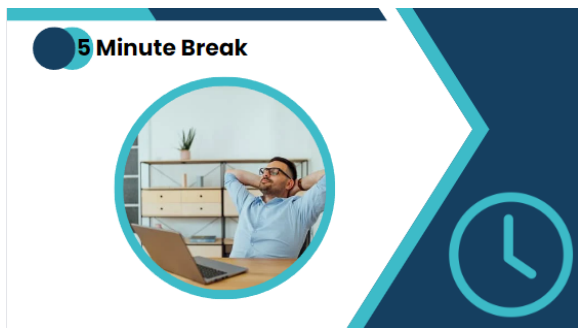
		work on revising them later in this training **DO:** ● Read the directions ● Tell participants this activity is 10 minutes ● At 9:30 minutes, direct the participants to start wrapping up	
Slide 14 (2 min) Key Takeaways	Key Takeaways 	**SAY:** ● Thank you for brainstorming your responses ● Does anyone have any thoughts or key takeaways that you encountered while responding with your answers? **DO:** ● Encourage participants to write in the chat or unmute themselves to respond	**DO:** ● Monitor the chat and participants for any technical issues
Slide 15 (5 min) Break	5 Minute Break 	**SAY:** ● Thank you so much for participating ● We are going to take a five minute break ● Please feel free to get up from your area and stretch, use the restroom or get something to drink **DO:** ● Start the 5 minute timer ● Monitor the timer and move on after 5 minutes	**DO:** ● Monitor the chat and participants for any technical issues

Slide 16 (1 min) Agenda		**SAY:** • Welcome back • Now we will get into breakout rooms and discuss a scenario to apply best practices and enhance the customer service experience **DO:** • Advance to the directions slide	**DO:** • Monitor the chat and participants for any technical issues • Prepare the breakout rooms
Slide 17 (15 min) Breakout Rooms		**SAY:** • In your breakout rooms you will have a chance to discuss the scenario assigned to your group • The scenario that will be assigned to your group will be the number breakout room you are in • Share your feedback with each other on how to use best practices to provide excellent customer service and handle difficult situations • If you still have time, you may work on any other scenarios as a group • We have fifteen minutes for this activity **DO:** • Direct participants to their guide • Encourage them to use best practices to provide excellent customer service	**DO:** • Monitor the chat and participants for any technical issues • Open breakout rooms immediately when facilitator is done speaking

		SAY:	DO:
Slide 18 (1 min) Agenda	**Agenda** ✓ What Are Best Practices for Excellent Customer Service? ✓ Why Do We Build Rapport and Foster Positive Relationships with Customers? ✓ How to Use Best Practices ✓ Write Your Own ✓ 5 Minute Break ✓ Peer Practice in Break Out Rooms ✓ Key Takeaways and Questions/Revision Using Feedback ● Quiz ● Wrap Up/Next Steps	**SAY:** ● Welcome back all ● Let's hear any key takeaways, thoughts or questions that your group may have had **DO:** ● Thank everyone for participating in the breakout room activity	**DO:** ● Monitor the chat and participants for any technical issues
Slide 19 (6 min) Key Takeaways and Questions	**Key Takeaways** 💬 Put answers in the chat or unmute yourself. 🔄 Revise your answers. 🕐 5 Minutes	**SAY:** ● What are some key takeaways or questions you or your group had? ● Please feel free to unmute or put it in the chat ● After we discuss, you will have a chance to implement any feedback to your answers **DO:** ● Thank everyone for participating in the breakout room activity	**DO:** ● Monitor the chat and participants for any technical issues
Slide 20 (1 min) Agenda	**Agenda** ✓ What Are Best Practices for Excellent Customer Service? ✓ Why Do We Build Rapport and Foster Positive Relationships with Customers? ✓ How to Use Best Practices ✓ Write Your Own ✓ 5 Minute Break ✓ Peer Practice in Break Out Rooms ✓ Key Takeaways and Questions/Revision Using Feedback ✓ Quiz ● Wrap Up/Next Steps	**SAY:** ● Thank you so much everyone ● We are now going to take a quick 4 question quiz in google forms	**DO:** ● Monitor the chat and participants for any technical issues ● Prepare quiz link in chat

Slide 21 (5 min) Quiz		**SAY:** ● Please click on the link in the chat ● This quiz will not be formally graded and is used to help gather feedback from this session ● You will have 5 minutes to complete the quiz **DO:** ● Direct participants to the link in the chat	**DO:** ● Monitor the chat and participants for any technical issues ● Post quiz link in the chat when facilitator references it ● Help anyone who can't access the quiz
Slide 22 (1 min) Summary		**SAY:** ● Thank you so much. In this lesson we covered… **DO:** ● Read objectives	**DO:** ● Monitor the chat and participants for any technical issues
Slide 23 (1 min) Next Steps and Thank You		**SAY:** ● Thank you for a wonderful session today ● This session has given you the tools and strategies to use when enhancing customer service interactions to excellent ● Please continue to practice these strategies after this session ● Please keep and refer to your participant guide ● Thank you **DO:** ● Encourage continued customer service practice	**DO:** ● Monitor the chat and participants for any technical issues ● End the session