

CUSTOMER SERVICE TRAINING: WELCOME SKILLS

45 MINUTES TOTAL TIME

Describe the importance of using Welcome Skills - Explain how body language impacts Welcome skills

DURATION	TOPIC	FORMAT	LEARNING ACTIVITY DESCRIPTION
:02	Opening the Call	Warm-up Activity/ Individual Reflection	Instructor asks participants to identify a time that they experienced a positive customer experience.
:03		Lecturette	<p>Instructor describes the importance of opening a call using the Welcome skills.</p> <p>The instructor asks participants to recall the positive customer experience they just identified. What do they remember about how the Rep answered the call and welcomed them? If they don't remember, how would they want a Rep to greet and welcome them?</p> <p>Instructor describes Welcome skills:</p> <ul style="list-style-type: none"> • Rep greets the customer with confidence • Rep thanks the customer for calling • Rep thanks customer for their business
:05	Attitude	Lecturette/ Large Group Discussion	Instructor shares how the welcome is shaped by attitude, which is demonstrated in three ways: tone of voice, verbal language, and body language. Instructor engages group in a discussion about how each of those three affect conversation in person and on the phone.



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:10	Body Language	Small Group Activity	<p>Each small group is assigned a topic (tone of voice, verbal language, or body language.) Participants collaborate within their group to identify and track on a flip chart the top three factors for their assigned topic for a successful Welcome. Instructor leads quick debrief report out from each group.</p>
:15	Attitude	Role-Play Triad Activity	<p>Participants role-play in pairs and sit in chairs or stand back to back; not facing one another. One will be told to play a happy, willing customer, one will (secretly) be told to play an uninterested Rep.</p> <p>The third will be told to observe if the Rep thanks for customer for calling and if s/he greets the customer with confidence (using the checklist to note characteristics).</p> <p>They will play out the scenario for 1 minute. The customer can hear, but cannot see, the Rep's body language; similar to being on a call.</p> <p>Each small group will debrief: The person playing the customer role will share first impressions and how this made him/her feel. The Rep will share what it felt like to play the "unhelpful" role. The observers will share what they saw and how this would make them feel as a customer.</p> <p>Close with a large group debrief with final thoughts and insights about the importance and impact of Welcome skills.</p>



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:08	Self-Assessment	Individual Reflection	<p>Now that participants have learned about Welcome skills, the instructor asks: What do you think your strengths are? Challenges? What will be most difficult as you apply these skills on the job? What is one thing you can do to overcome this? Is your self-identified characteristic something you have heard from others in the past? How did hearing those same characteristics make you feel?</p> <p>Debrief by asking a few volunteers to share.</p>
:02	Self-Assessment	Large Group Lecturette Summary	<p>Summarize the key points for the right way to welcome.</p>

Suggestion for Reinforcement:

Link the application of skills to future customer situations and work with supervisor on follow up.

