This companion Customer Service Certification Program guide enhances the learning of the certification program and can also be used as a tool for completing the Learn More and Activity segments referred to in the video. Follow along in the workbook as indicated. Refer to the index for navigating through the different modules and chapters in this workbook.

We recommend that you complete the Pretest for each module prior to watching the video to familiarize yourself with the key concepts of the program.

Passing the certification is important. You should complete all the segments in each module including the practice tests, Learn More and Activity sections. If your company has purchased the online test license, you may log on to the certification Web site to begin taking the exams. Successful completion of all six exams is required to achieve certification.

Enjoy the training and good luck with your certification.

*Through the Customer’s Eyes*

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Module 1

Why Customer Service Matters

How to Establish Superior Value and Profitability

This module introduces you to the core concepts of:

- Lifetime Value
- Value
- Benefits
- Cost
- Creating Lifetime Customers

You will continue to encounter these core concepts as you complete the subsequent video training. The goal is to master the concepts, pass the exam and achieve certification.
Module 1 Pretest

1. When a person receives bad customer service, what is he or she most likely to do?
   a. Complain to a manager.
   b. Write a letter to the president of the company.
   c. Never do business with the company again.
   d. Find another salesperson.

2. True or False? Finding a new customer is cheaper than keeping an existing one.

3. If your company did not have to continually replace lost customers, money spent on marketing to replace lost customers could be used on: (Select all that apply.)
   a. New technology
   b. Equipment
   c. Expanded employee benefits
   d. Employee compensation

4. Which statement is the most true?
   a. Customers are most concerned with the cost of a product or service.
   b. Customers are attracted and retained by superior value of a product or service.
   c. Customers focus primarily on the convenience of obtaining a product or service.

5. Which type of customer service representative could improve the profitability of your business?
   a. A CSR who follows procedure to the letter, who maintains a strictly detached tone and attitude, and doesn’t spend extra time with customers.
   b. A CSR who listens and empathizes with customers, and lets customers know that their business and satisfaction is important to the company.
   c. A CSR who does whatever it takes to make customers happy regardless of the amount of time and resources it takes.
Module 1 — Pretest

6. Let’s assume your company manufactures and sells heavy construction equipment. Select all of the following that could be considered customers of your company:
   a. The architect who designed the plans for a building.
   b. The construction company that is the contractor for building the building.
   c. The union which provides the skilled labor for your company.
   d. The companies that have lease agreements to occupy the building when it is finished.
   e. The heavy equipment dealer who is a supplier to the contractor.

7. What is the MOST LIKELY reason why a customer would never patronize your business again?
   a. Product or service wasn’t adequate.
   b. Received poor customer service.
   c. Inconvenient location.
   d. Too many other customers.

8. True or False? A Final Customer is a person who purchases the product or service that your organization produces or provides.

9. True or False? An Intermediate Customer is a potential customer who has NOT purchased your product or service yet but is likely to do so.

10. True or False? An Internal Customer is a person who works for your organization and carries out functions on the way to the intermediate or final customers.
Through the Customer’s Eyes

1. Why Customer Service Matters

• According to an article by Richard Gibson, McDonald's restaurants may be losing as much as $750 million in potential sales because of bad customer service.
• A disgruntled customer will tell between 15 and 20 people about their bad customer service experience.
• The cost of acquiring new customers is five to six times more than the cost of keeping a current customer. These costs take away from new equipment, benefits and compensation.
• Lifetime Value — The amount of money a customer will spend with your business over the course of their lifetime.

Learn More

Please read the following statements from the Handbook of Business Quotations compiled by George Thomas Kurian, and reflect on how these statements might apply to your specific responsibilities. Please write down any you wish to save for future use.

“There is never a good sale for Neiman Marcus unless it is a good buy for the customer.” — Stanley Marcus (Neiman Marcus)

“If you put quality first and service first, the money will take care of itself.” — Joyce Hall (Hallmark Cards)

“The man who will use his skill and constructive imagination to see how much he can give for a dollar, instead of how little he can give for a dollar, is bound to succeed.” — Henry Ford (Ford Motor Company)

“The consumer is not a moron. She is your wife.” — David Ogilvy (Ogilvy & Mather Advertising)
Activity — Lifetime Value Worksheet

Sample Worksheet

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Transaction Amount</td>
<td>$ 100,000</td>
</tr>
<tr>
<td>Number of Purchases Per Year</td>
<td>12</td>
</tr>
<tr>
<td>Yearly Amount Spent</td>
<td>$ 1,200,000</td>
</tr>
<tr>
<td>Expected Years as a Customer</td>
<td>10</td>
</tr>
<tr>
<td>Lifetime Value of Your Customer</td>
<td>$12,000,000</td>
</tr>
</tbody>
</table>

Now that you have seen an example from another business, what is your customer’s Lifetime Value? You’ll need to know how much an average customer spends with your company. If you don’t know, make your best guess or ask your manager.

Activity Worksheet

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Transaction Amount</td>
<td>A $</td>
</tr>
<tr>
<td>Number of Purchases Per Year</td>
<td>B Years</td>
</tr>
<tr>
<td>Yearly Amount Spent</td>
<td>C $</td>
</tr>
<tr>
<td>Expected Years as a Customer</td>
<td>D Years</td>
</tr>
<tr>
<td>Lifetime Value of Your Customer</td>
<td>E $</td>
</tr>
</tbody>
</table>

Multiply line A by line B and enter that number on line C. Multiply line C by line D and enter that number on line E.
2. Customers Are the Lifeblood of Any Business

Video example: Tool warehouse manager and parts supplier

“The very purpose of a business is to create and keep a customer.”
— Theodore Levitt of Harvard Business School

“The business of business is to get and keep customers.”
— Peter Drucker, author

“Today, more than ever before, enterprises must create value for their customers in a way that is superior to that of their competitors.”
— William Band, author of Creating Value for Customers

Customers are attracted and retained by superior value.

- Value — The benefit the customer receives minus the cost the customer must pay.
- Benefits — Something the customer wants or needs that is provided by a product or service.
- Costs — Money, time spent, aggravation endured, hassle involved, uncertainty, inconvenience or unreliability.
- Value = Benefits minus Costs

Learn More

Example of superior service provided by Neiman-Marcus demonstrating that customer service matters.
Module 1 — Customers Are the Lifeblood of Any Business

Activity — Benefit vs. Cost Worksheet

Listed below are some factors that, depending on the circumstance, could either be Benefits or Costs to the customer. Thinking about the previous video scenario with Mark and Dan, assign a value for each factor depending on whether you think it is a Benefit or a Cost. Circle 10 for it being a High Benefit or 1 for it being a High Cost. Total your scores and compare to the Appendix at the end of this workbook.

Convenience

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Product Quality

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>9</td>
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<tr>
<td>8</td>
<td>7</td>
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<td>6</td>
<td>5</td>
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<tr>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Considerate of Customer’s Time

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>8</td>
<td>7</td>
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<td>6</td>
<td>5</td>
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<td>4</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Price (Money)

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>9</td>
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<tr>
<td>8</td>
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<td>5</td>
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<tr>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Attitude of Employee

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>8</td>
<td>7</td>
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<tr>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Total ________________
3. Customers Are Attracted and Retained by Superior Value

Value is added through the following steps:

- Be available.
- Listen carefully.
- Be helpful, but realistic.
- Respond quickly.
- Overdeliver.

Using these techniques adds value for the customer and builds loyal, profitable, long-term relationships.

Learn More — The Three Areas of Benefit

- Core Benefit — Comes from the product itself.
- Expected Benefit — Something that the customer would expect to receive with the core benefit.
- Bonus Benefit — Something that the customer does not expect which creates added value for the customer.
Activity — Benefits Your Company Provides for Your Customers

Refer to the table below to list the benefits of YOUR company. Take some time to reflect on the benefits — Core, Expected and Bonus — that your company offers.

- Core Benefit — What is the Core Benefit of doing business with your company?
- Expected Benefit — What is the Expected Benefit of doing business with your company?
- Bonus Benefit — What is the Bonus Benefit of doing business with your company?

Benefits Table

<table>
<thead>
<tr>
<th>Core Benefit</th>
<th>Expected Benefit</th>
<th>Bonus Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>
4. Great Service Means Loyal Customers

Example: Online book purchase

Great performance by a customer service professional can secure a loyal customer for years to come. The knowledge, skill and attitude of the customer service professional are perhaps the key determinants of customer satisfaction. The landmark study by the Forum Corporation found that 70 percent of customers who stop doing business with a company do so because they received too little attention or poor quality attention. Customer service representatives hold the key to customer satisfaction and profitability. High customer satisfaction is more indicative of profitability than any other variable.

Learn More

Through research projects, Forum Corporation sought to define and measure successful practices. On customers leaving the company, they found that:

- 15 percent left because they found a better product.
- 15 percent left because they found a cheaper product.
- 20 percent left because there was too little contact or personal attention.
- 50 percent left because the service they had received was poor in quality.

Activity

Select the BEST answer from the following statistics regarding customer service. Compare your response with the Appendix at the end of this workbook.

a. A customer will spend up to 10 percent more for the same product with better service.

b. When a customer receives good service, he or she will tell between nine and 12 people on average.

c. If the service is really poor, 91 percent of retail customers won't go back to the store.

d. All of the above
5. Creating Lifetime Customers

Great customer care helps create lifetime customers.

Key aspects of customer care:

- Listen
- Apologize
- Fix
- Follow Up

When you handle a problem professionally, you have a good chance of creating a loyal customer. Remember, according to the Technical Assistance Research Programs Institute of Washington, D.C., anywhere from 50 percent to 80 percent of those who complain and have their complaint resolved positively will remain loyal customers to that business. Complaints point out areas for improvement and give us a chance to restore value.

Learn More — Three Categories of Customers

1. Final Customers — Final or ultimate customers who pay for or use your company’s products or service.

2. Intermediate Customers — Dealers or distributors are examples. Your product or service must pass through them to get to the Final Customer.

3. Internal Customers — People who work for your organization and carry out the process on the way to the Intermediate or Final Customer.
Activity

Understand the importance of dollars and cents in terms of resolving customer complaints. As discussed in earlier sections, research indicates a successful resolution of a customer complaint can result in that customer remaining a loyal customer. Assume you’re the manager of a company that manufactures cheese logs. Where indicated in the table:

1. Enter a monthly number of customers.
2. Enter an average amount spent per customer.
3. Enter the number of complaints received each month.
4. Enter the percentage of complaints successfully resolved.

Complaint Table

<table>
<thead>
<tr>
<th>Customers Per Month</th>
<th>A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Spending Per Customer Per Month</td>
<td>B $</td>
</tr>
<tr>
<td>Monthly Gross Sales = Customers (A) x Average Spending (B)</td>
<td>C $</td>
</tr>
<tr>
<td>Number of Complaints Per Month</td>
<td>D</td>
</tr>
<tr>
<td>Percent of Complaints Successfully Resolved</td>
<td>E</td>
</tr>
<tr>
<td>Number of Customers Lost Per Month</td>
<td>F</td>
</tr>
<tr>
<td>Monthly Revenue Lost Due to Lost Customers</td>
<td>G $</td>
</tr>
<tr>
<td>Number of Months Before Revenue Is Exhausted</td>
<td>H</td>
</tr>
</tbody>
</table>

Calculate line C by multiplying line A by line B. Subtract line D from line E and fill that value in for line F. Multiply line B by line F and fill in line G. Divide line C by line G to arrive at line H. Complete the calculation to determine how long your cheese log factory will remain in business. How long will you be working at this rate?
Module 1 — Creating Lifetime Customers

Module 1 Glossary

Benefit — Something that the customer wants or needs which is provided by your product or service.

Bonus Benefit — Services or extensions of the use of the product or service that earn loyal customers.

Core Benefit — A Benefit that is received by the actual product or service.

Create Value — Ability to demonstrate superiority to your competition for your customer.

CSR — Customer Service Representative

Expected Benefit — Benefits that piggyback with the purchase of the product or service.

Final Customers — People who purchase the product or service that your organization produces or provides.

Intermediate Customer — The dealer or distributor that your product or service passes through.

Internal Customers — People who work for your organization and carry out functions on the way to the intermediate or final customers.

Lifetime Value — The average amount of money a customer will spend in your business over the course of his or her lifetime.

PIMS — The Profit Impact of Market Strategy

Superior Value — Attitude created that will allow you to attract and retain customers.

"The Customer is always right" — Best-known adage about customer service

Value — Benefits minus Costs

Value Components — Price, Quality and Purchase experience
Module 1 Practice Test

1. Select the answer below that most accurately fills in the blank in this sentence: Most experts estimate that a disgruntled customer will tell between ________ people how they were treated.
   a. 1–3
   b. 5–10
   c. 15–20
   d. 30–40

2. Which of the following is the equation used to explain value?
   a. Cost to company minus benefit to customer
   b. Benefit to customer divided by cost to company
   c. Benefit to customer minus cost to customer
   d. Benefit to company multiplied by cost to customer

3. Which of these activities is NOT associated with the cost side of the value equation?
   a. Aggravation to complete the purchase
   b. Time spent to complete the purchase
   c. Reliability of the product
   d. Not getting what you want
   e. Getting what you want

4. A Forum Corporation study identified three major reasons why a customer leaves a company for a competitor. Those three are 1) finding a better product, 2) finding a cheaper product and 3) too little or poor quality customer service. Based on the information supplied in this module, what percentage of customers left a company because of customer service issues?
   a. 28 percent
   b. 50 percent
   c. 70 percent
   d. 92 percent

5. Lifetime Value, in reference to one of your customers, is defined as:
   a. How important the customer is to your business.
   b. The total length of time a customer does business with your company.
   c. The average amount of money a customer will spend with your business over the course of his or her life.
   d. The value your company perceives each customer has.
__6. According to information supplied in this module, what happens to customers who do complain and have their complaints resolved?
   a. Most become loyal customers.
   b. The majority become stockholders.
   c. More than half are never heard from again.
   d. The majority will file at least one more complaint in the next five years.

__7. Based on the first example with Mark, the plant manager, and Dan, the parts supplier, select all of the following that you think Mark would say apply to Dan.
   a. Dan was indecisive and unconcerned.
   b. Dan offered no definite solutions.
   c. He did not call Mark in a timely manner.
   d. Dan did what Mark needed.

__8. Select all of the following that are basic components of “Value” to a customer:
   a. Price
   b. Quality
   c. Purchase experience
   d. Free merchandise
   e. Web access

__9. Based on the second example between Mark and Dan, check all the things that Dan did to improve Mark’s experience as a customer:
   a. Listened attentively.
   b. Empathized.
   c. Followed up in a timely manner.
   d. Delivered a solution.

__10. Select the statement that best defines, “It is better to underpromise and overdeliver, than to overpromise and underdeliver.”
   a. Tell the customer you will try, be realistic but instill a sense of confidence that their minimum request will be met. Then meet this minimum request plus bonus benefits.
   b. Tell the customer you will try but it is unlikely you can fulfill their request. Then when you don’t meet their request, they aren’t disappointed.
   c. Tell the customer what they want to hear, get their hopes up so they think you are going to come through for them. When you don’t, they’ll know you were trying your best.
   d. Never ever promise something unless you are 100 percent sure you can deliver. That way, you’ll always avoid dealing with an unhappy customer.
Through the Customer’s Eyes

11. Recall the example in which the customer received the incorrect book. Select all the ways that the customer service representative made the customer feel unimportant.
   a. Told the customer that it was the customer’s fault for entering the wrong number on the order form.
   b. The CSR offered an acceptable solution to help the customer.
   c. The CSR made it a hassle for the customer to return the incorrect book and receive the correct book.
   d. The CSR clearly stated the company policy for returns and exchanges.

12. From the following list, select the four essential steps all customer service representatives should use when a customer calls with a complaint:
   a. Listen carefully.
   b. Place the customer on hold.
   c. Direct the customer to a supervisor.
   d. Apologize for the problem.
   e. Log the complaint into the unhappy database.
   f. Fix the situation.
   g. Follow up with the customer.
   h. Offer free merchandise.

13. Every business has three types of customers. Match the type of customer to the definition by filling in the letter of the correct definition beside the type of customer.
   1. Final Customers ____
   2. Intermediate Customers ____
   3. Internal Customers ____
   a. The dealer or distributor that your product or service passes through.
   b. People who purchase the product or service your organization produces or provides.
   c. People who work for your organization and carry out functions on the way to the intermediate or final customers.
   d. People with the money and the motivation to buy your product.

14. If ABC Company has a customer that spends an average of $500 per month, what is the LTV of this customer over a 10-year time frame?
   a. $50,000
   b. $60,000
   c. $32,000
   d. $5,000
Module 1 — Practice Test

15. What does LTV stand for?
   a. Life Time Value
   b. Living Through Venture
   c. Life, Timeliness, Vested
   d. Listen to Values

16. True or False? A Final Customer is a person who purchases the product or service that your organization produces or provides.

17. True or False? An Intermediate Customer is a potential customer who has NOT purchased your product or service yet, but is likely to do so.

18. True or False? An Internal Customer is a person who works for your organization and carries out functions on the way to the Intermediate or Final Customers.

19. Trudy, a CSR, always listens to a customer, then apologizes, then she offers to fix the situation. What is the last step Trudy needs to implement to provide the best customer service possible?
   a. Talk to her manager.
   b. Follow up with the customer.
   c. Make sure a paper trail is created for transactions.
   d. Go on a break.

20. Which statement is the most “TRUE”?
   a. Customers are most concerned with the cost of a product or service.
   b. Customers are attracted and retained by superior value of a product or service.
   c. Customers focus primarily on the convenience of obtaining a product or service.

See the Appendix for answers to the Practice Test. If you missed any questions, go back and review those sections before taking the certification exam.
Module 2
What Customers Want

Learn to deliver good service, personal attention and promptness.

This module introduces you to the core concepts of:

- Good service
- Personal attention
- Employee competence
- Promptness

This module will provide you with skills and information regarding good service, personal attention, employee competence and promptness. Understanding these core concepts is key to passing your certification for Module 2.

Some of the things you’ll learn in this module include:

- Why your company’s success and profitability are directly related to quality service.
- How to say ‘No’ by saying ‘Yes’ first.
- How to give customers confidence in your service.
- Why it’s important to value a customer’s time.
Module 2 — Pretest

_1. True or False? Consumers are generally happy with the value of services that they receive._

_2. True or False? Consumers are generally happy with the value of products that they receive._

_3. True or False? A company is more likely to do business with another company that offers the best customer service over the best price._

_4. True or False? Most customers believe that COST is more important than SERVICE when they are buying a service rather than a product._

_5. When asked about a time when they had really high-quality service, most consumers usually remember or focus on:
a. The really cheap price they paid.
b. They got the last item available.
c. Exceptional personal attention.
d. The age of the person who helped them.
e. The day of the week they had the experience._

_6. True or False? One of the ways to instill confidence in a customer is to have confidence in yourself._

_7. True or False? Good customer service can make or break a company._

_8. Customers want to deal with someone who is confident and knows what they are doing. This can be referred to as:
a. A know-it-all
b. The president of the company
c. Employee competence
d. The boss’s son theory
e. Department supervisor
1. People Want Good Service

Fundamental elements that create good customer service are:

- Personal attention
- Employee competence
- Promptness

According to the National Family Organization, the value of products is generally considered high, whereas the value of service is perceived as low.

Over 40 percent of customers surveyed said that service is fair or poor. The same study from the Cambridge Reports referred to in The Service Edge by Ron Zemke cites personal attention, employee competence and promptness as factors for high-quality service.

Learn More

Service can make or break a company. Customers expect good service and aren’t afraid to take their business elsewhere if they aren’t getting it. Patricia Seybold, CEO of an e-business consulting company, states it clearly, “Companies that don’t wake up and pay attention to this are going to be out of business.”

There is a direct correlation between customer satisfaction and earnings, as demonstrated in the American Customer Service Index. The index depicts the relationship between customer satisfaction and company earnings. The index is available at the following link: www.theacsi.org
Activity — People Want Good Service

1. In his book *The Service Edge*, author Ron Zemke cites a survey from Cambridge Reports. In it, consumers were asked how well service companies met customer needs and concerns. What percentage answered “Fair or poor”?
   a. 8 percent
   b. 25 percent
   c. 40 percent

2. According to the same study, which of the following is NOT a factor that defines high-quality service?
   a. Personal attention
   b. Employee competence
   c. Promptness
   d. Terms of sale
2. Personal Attention

Video example: A customer in a restaurant interacts with a waiter.

Bad service costs customers — over 80 percent of those surveyed cite “poor service” as the number one reason why they would not return to a restaurant. And it’s not just the restaurant industry where this is true — your clients may feel the same way. Relate to and focus on the customer. Treat the customer like a person, not a transaction.

A few ways to offer personal attention:

• Be friendly.
• Be polite.
• Be attentive.
• Be patient.
• Smile.
• Make eye contact.
• Offer suggestions.

Learn More

A great technique for saying “No” is to start by saying “Yes.” Two key phrases when you have to say “No”: “What I can do is …” and “Here’s what you can do …” By stating what you CAN do, you indicate to the customer that you want to help.
Module 2 — Personal Attention

Activity

Four key concepts of personal attention:

1. Focus on what the customer wants.
2. Don't try to fit the customer into a mold.
3. Come up with solutions unique to the customer and his or her needs.
4. Make sure the customer is completely satisfied.

Bear these four concepts in mind while completing this activity. Below is a two-column table. In column one, list the most common requests that are necessary for you to deny. Then, based upon what you've learned in this module, write a productive response to that request. Write what you WILL say when you CANT say "yes" to the customer's request.

<table>
<thead>
<tr>
<th>Request</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Employee Competence

- Be informed.
- Anticipate questions.
- Assure the customer.
- As a customer service professional, you must make it your business to be an expert on your company, your products and your services.
- If you don’t know the answer to a customer’s question, a better way to say “I don’t know” is “I don’t know, but I’ll find out and call you back today.”

Learn More

The story of Ben Duffy: Why it’s important to be prepared and anticipate your customer’s needs. Greater customer satisfaction — and maybe even more sales — are the result of being well-prepared to meet your customer’s needs.
Module 2 — Employee Competence

Activity — Anticipating Customer Needs

Anticipating customer needs and having the knowledge to answer customer questions are key skills of the customer service professional.

In column one, list the most common questions or issues you hear from customers. Then, in column two, list some ways you could become more knowledgeable in answering those questions or addressing those issues.

Knowledge Worksheet

<table>
<thead>
<tr>
<th>Question/Issue</th>
<th>Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4. Promptness

Promptness means being on time — being punctual. It means to carry out an action without delay. In a study, the National Sleep Foundation found that Americans are getting one hour and six minutes less sleep than they need every day.

Productive Trio:
- Make it quick.
- Make it easy.
- Make it enjoyable.

Learn More — Customers Value Their Time

About 50 percent of adults say they will sleep less to get more done.

List three things you can do to demonstrate that you value a customer's time.

How I can make it …

1. Quick

2. Easy

3. Enjoyable
Activity — Promptness

Making it quick, easy and enjoyable for customers leads to customer satisfaction. Answer each of the following questions by selecting ‘Agree’ or ‘Disagree.’ Check your answers in the Appendix.

1. There are some people you just can’t please.
   □ Agree □ Disagree

2. Once you are experienced in working with customers, you automatically know what they want without having to check.
   □ Agree □ Disagree

3. Customers are always satisfied when you do a good job.
   □ Agree □ Disagree

4. Customer feedback, regardless of tone and content, can help you be more productive.
   □ Agree □ Disagree

5. Personal attention is one of the keys to customer satisfaction.
   □ Agree □ Disagree

Module 2 Glossary

Business to Business — When your products or services are sold to other businesses, not to consumers.

Employee Competence — The ability of the employee to demonstrate that he or she is informed, can anticipate questions and can create expectations. Understanding the necessary components of doing a quality job.

High-Quality Customer Service — Providing personal attention, employee competence and promptness.

Poor Service — Not providing personal attention, employee competence and promptness — the reason why 80 percent of customers polled by the Gallup Organization would not choose a restaurant.

Productive Trio — Make it quick, easy, enjoyable.

Promptness — Being on time, being punctual, completing an action without delay.

Terms of Sale — Basis or conditions on which a sale of products or services is made.

24/7 — Operates 24 hours a day and seven days a week.
Module 2 Practice Test

_1. When people define high-quality customer service, three components are identified frequently. These three components are:
   a. Attractive employees
   b. Personal attention
   c. Good Web site
   d. Employee competence
   e. Promptness

_2. True or False? According to Cambridge Reports, less than 10 percent of consumers surveyed rated the quality of service companies as “excellent” in meeting customer needs and concerns.

_3. If you were the waiter in our restaurant example, select ALL the things you should NOT do if you wanted to provide good service:
   a. Walk away and talk to another waiter while the customer is talking to you.
   b. Insult the customer by belittling her complaint.
   c. Do nothing to remedy the situation.
   d. Smile and offer an alternative dish.
   e. Offer a complimentary dessert.

_4. The Gallup Organization asked customers what would make them decide NOT to return to a restaurant. Eighty percent responded they would not choose a restaurant based on what reason?
   a. Too expensive
   b. Poor service
   c. Loud music
   d. Too crowded
   e. Average food quality

_5. Referring to the positive example of restaurant customer service in our video, which selection below shows that the waiter made the customer feel he cared?
   a. Smiled.
   b. Recommended an entrée.
   c. Listened to the complaint and did his best to remedy.
   d. Offered a complimentary dessert.
   e. All of the above.
6. Company profits generally ____________ after a period of ____________ customer satisfaction results.
   a. Decline, average  
   b. Fall, good  
   c. Rise, good  
   d. Stay steady, poor  
   e. Improve, declining

7. Select ALL of the following that are NOT factors in our definition of High-Quality Service.
   a. Personal attention during the purchase  
   b. Terms and conditions of the purchase  
   c. Promptness during the purchase  
   d. Cost of the purchase  
   e. Employee competence during the purchase

8. Select ALL that apply to demonstrate competence to customers:
   a. Focus on what the customer wants  
   b. Anticipate questions  
   c. Answer truthfully  
   d. Tell them what to expect — explain the process  
   e. Keep them updated and informed

9. Joe, the assistant manager of a bookstore, is completely out of a particular John Grisham novel and will not receive a new shipment for at least three days. Several customers are requesting this book. A woman approaches the counter.
   Woman: I am interested in the new John Grisham. I really love lawyer novels.
   Joe: I’m sorry, we currently don’t have that book in stock. We should have it in three days.
   Woman: So what am I supposed to do?
   Joe: If you give me your name and number or e-mail address, I can notify you as soon as it arrives.
   Woman: Well, I guess that’s alright.
   Joe: If you like John Grisham, you might also really like Patricia Cornwell or James Patterson books.
   Woman: Thank you for the tip.

This situation and how it was handled demonstrate the technique of:
   a. Getting rid of the customer quickly so you can help the next person.
   b. Saying “No” but still saying “Yes.”
   c. Following company policies and procedures.
   d. Selling slow-moving inventory.
10. Choose the BEST answer to demonstrate your competence even though you don’t know how to answer the customer’s question.
   a. Transfer the customer to a supervisor.
   b. Put the customer on hold until you can find out the answer.
   c. Tell the customer to refer to the user’s manual.
   d. Tell him or her you don’t know, apologize and say when you’ll call back with the answer.
   e. Transfer the customer to another person in your department who might know the answer.

11. When you can’t immediately solve the customer’s problem, there ARE things you can still do to provide quality service. Select the BEST answer.
   a. Explain the expected time frame for the solution clearly.
   b. Show confidence that you will make sure the problem is resolved.
   c. Offer alternatives to give choices and control to the customer.
   d. Acknowledge the problem, apologize and get all the necessary information.
   e. All of the above.

12. Select the three elements of “Promptness”:
   a. Be at work.
   b. Make it quick.
   c. Make it easy.
   d. Make it enjoyable.
   e. Talk fast.

13. You are an associate of an upscale music store. You notice a woman looking at CDs in the Jazz section. She is flipping through the discs and looking rather agitated. She walks around the store and then comes back to the Jazz section. She looks around for an employee, but no one is in that area. You immediately approach the woman and ask if you can help her locate the CD she is looking for. You ask what type of music she enjoys and make suggestions of music of this type. If you are unfamiliar with this type of music, you offer to look up selections on the computer, or obtain help from another employee. You have just demonstrated:
   a. Personal attention
   b. Employee competence
   c. Promptness
   d. All of the above
   e. None of the above
Module 2 — Practice Test

14. Customers, just like the rest of us, value their time highly. They don't want to waste time while trying to buy things or resolve questions about a purchase. Based on information in the program, approximately how many working adults are willing to trade sleep in order to get more done with the extra time?
   a. Almost none
   b. About one-quarter
   c. About one-half
   d. About three-quarters
   e. Almost everyone

15. True or False? When purchasing a service, most people feel customer service is more important than cost.

16. True or False? Generally, company profits are correlated with the quality of customer service.

17. True or False? Personal attention is one of the key components of good customer service.

18. What attitudes reflect the qualities of positive personal attention that will create excellent customer service? (Select all that apply.)
   a. Patience
   b. Calmness
   c. Differentiation
   d. Anger
   e. Understanding
   f. Listening

See the Appendix for answers to the Practice Test. If you missed any questions, go back and review those sections before taking the certification exam.
Module 3

Essential Customer Service Skills, Part I

Learn core skills to enhance customer relationships —
Empowerment, Attitude, Listening, Patience, and Persistence

This module will provide you with the first four of eight essential customer service skills.

1. Empowerment
2. The Service Attitude
3. The Art of Active Listening
4. Patience and Persistence

Every associate in your organization should master and apply these skills in order to deliver the highest quality service. Your success, and that of your company, is tied to these essential skills. We encourage you to review the material prior to taking your certification exam.

It WILL pay off in the long run as you demonstrate your superior service and prove that you are Customer Service Certified!
Module 3 Pretest

1. True or False? Proper customer service skills can be the difference between a completely satisfied customer and a very unhappy customer.

2. How you think, feel and respond as a customer service representative is determined by:
   a. Your supervisor
   b. The customer
   c. You
   d. Your coworkers

3. Which is the single most important skill in dealing with customers?
   a. Verbal skill
   b. Explaining company policies
   c. Listening skill
   d. Computer expertise

4. Adopting a service attitude means focusing on:
   a. Company policies
   b. Profits
   c. The customer
   d. Deadlines

5. Which of the following comments most exemplifies a service attitude?
   a. “Our records indicate you received those products a month ago.”
   b. “Let’s see how we can get this taken care of right away.”
   c. “I’m sorry, but we have a no-returns policy.”
   d. “I’ll have to refer you to my supervisor.”

6. When a customer enters a business, which of these demonstrates a service attitude?
   a. Smiling and greeting the customer.
   b. Appearing to be busy.
   c. Staying away from the customer so you don’t scare him or her off.

7. Complete the following sentence: Thoughts lead to beliefs, which lead to …
   a. Actions
   b. Suspicions
   c. Satisfied customers
   d. Dissatisfied customers
Through the Customer’s Eyes

8. Listening to your customers involves not only hearing their words, but also:
   a. Making sure they’re not trying to get something for nothing.
   b. Understanding what they really mean.
   c. Thinking about what you will say next.
   d. None of the above.

9. Rephrasing the content has what effect?
   a. It demonstrates your vocabulary skills.
   b. It gives you time to take better notes.
   c. It demonstrates to the speaker that you understand his or her content.

10. Reflecting the feeling demonstrates what?
    a. You want to be like that person.
    b. You care about what the speaker is saying.
    c. You want to change the speaker’s mind.

11. True or False? Fifty percent of communication is through body language and tone of voice.

12. Which of the following demonstrates body language that communicates a desire to help the customer?
    a. Making eye contact with the customer, smiling and offering assistance.
    b. Acting distracted, poor posture, little effort to provide assistance.

13. True or False? Helping a customer takes priority over everything else.

14. A key customer service skill is:
    a. Calling the customer by name.
    b. Listening to what the customer is saying.
    c. Adopting a helpful attitude.
    d. All of the above.

15. A good customer service professional focuses on:
    a. Solving the customer's problem.
    b. Making sure the customer isn’t trying to cheat the company.
    c. Impressing company management.
1. Essential Customer Service Skills

Customer service skills can make all the difference — the difference between completely satisfied customers and unhappy customers.

- Empowerment — Only you choose how you think, feel and respond.
- Service Attitude — Single-minded focus on helping customers.
- Active Listening — The single most important skill in dealing with customers.
- Patience and Persistence — Problem solving requires tenacity.

Learn More — Empowering Quotes

Reflect on the following quotes, bearing in mind the topics of Empowerment and the Service Attitude.

“Human beings, by changing the inner attitudes of their minds, can change the outer aspects of their lives.”
— William James

“A strong positive mental attitude will create more miracles than any wonder drug.”
— Patricia Neal

“You can make more friends in two months by becoming interested in other people than you can in two years by trying to get other people interested in you.”
— Dale Carnegie

“If you treat people right they will treat you right — 90 percent of the time.”
— Franklin D. Roosevelt

“Weakness of attitude becomes weakness of character.”
— Albert Einstein

“Success is just a matter of attitude.”
— Darcy E. Gibbons
Activity — The Service Attitude Quiz

Select your answer to the following questions, then compare your answers to the results found in the Appendix.

1. In the scenario involving the missing HAZMAT signs, what do you think the most important responsibility of the customer service representative should be?
   a. Solving the customer's problem.
   b. Protecting his company from loss.

2. In the scenario involving the missing HAZMAT signs, what would be the best response when the customer service representative was told of the missing signs?
   a. According to my records, everything was received and signed for.
   b. Let me see if I can figure out how this happened.
   c. First, let's get you some signs on the way. Then we'll try to figure out what happened on the first order.

3. Which of the following describes the most effective initial attitude when dealing with customer problems?
   a. This person has a problem, and I have a chance to help.
   b. Sounds like they want to take advantage of us again.
   c. I'm not sure this is on the up and up. I better be careful here.
2. **Customer Analysis**

**Internal Focus:**
- Thoughts lead to beliefs, which lead to actions.
- Empowerment and Service Attitude.
- Consciously choosing to think, feel and respond positively.

**External Focus:**
- Focus on the customer rather than on oneself.
- Take responsibility.
- Define the problem.
- Select a solution.
Learn More — Smiling: the Best Medicine

Humor increases endorphins and neurotransmitters and decreases the level of the stress hormone adrenaline.

Activity — Rate Your Attitude

Rate yourself on the following questions on a scale of 1–5 with 1 being Agree and 5 being Disagree.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A difficult customer can ruin my day.</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>2. My mood is affected by external circumstances.</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>3. I get rid of difficult customers as quickly as possible.</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>4. A negative coworker can dampen my enthusiasm.</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>

Total _________________

Total your score to see what your Service Attitude is.

4–15 — If you scored between 4 and 15, consider working on your attitude for greater customer service results.

16 or higher — Proves you are aware of the importance of attitude and are in control of your feelings and emotions.
Module 3 — Concepts, Beliefs, Actions

3. Concepts, Beliefs, Actions

• Empowerment
• Service Attitude
• External Focus

Learn More

Recall the J.C. Penney story from The Book of Business Anecdotes by Peter Hay. J.C. Penney’s attitude of not cheating his employer and concentrating on better ways to serve his customers proved to be a major ingredient for his success.

Activity — Attitude Quotes

The attitude of a customer service representative has a significant impact on customer satisfaction. You choose how to think. Below, match the quotes with the author by writing the letter of the author’s name next to the corresponding quote. For answers, refer to the Appendix.

1. “You can get anything you want in life if you help other people get what they want.”
2. “If you don’t like something, change it. If you can’t change it, change your attitude. Don’t complain.”
3. “The last of the human freedoms is to choose one’s attitude.”
4. “No pessimist ever discovered the secret of the stars, or sailed to an uncharted land, or opened a new doorway for the human spirit.”
5. “It is one of the most beautiful compensations of life, that no man can sincerely try to help another without helping himself.”

a. Maya Angelou
b. Ralph Waldo Emerson
c. Viktor Frankl
d. Helen Keller
e. Zig Ziglar
4. Active Listening, Patience and Persistence

Video example: Customer needs a garment for a special occasion.

- What is the customer saying?
  Listen to your customers. The Art of Active Listening involves not only hearing words, but also understanding the meaning and feeling behind the words.

- Rephrase and Reflect.
  Rephrase the content and reflect the feeling — the customer will know you’re listening.

- Body Language
  Ten percent of communication is through words and 90 percent is through body language and voice tone.

- Attend the Customer.
  Observe your own body language — show the customer you’re focused on them.

Learn More — Remembering Names

A key customer service skill is to call your customers by name. But often when we first meet a new person, we forget his or her name as soon as we’re introduced. Remembering a name is really a listening skill. Here are some verbal techniques and some visual techniques for remembering a name when you are introduced to a new person.

Verbal Techniques:
- Register the person’s name — pay attention!
- Repeat the person’s name to yourself.
- Comment on the name.
- Use the person’s name, out loud, as soon as possible.

Visual Techniques:
- Associate the name with something meaningful.
- Note distinctive features of the person’s face.
- Form a visual association between the name and the distinctive feature.

After you’ve come up with a way to remember someone’s name, review it soon after the introduction, repeat it again in 15 seconds and once more a few minutes later. You’ll be surprised at how much satisfaction a customer will get just from hearing you call them by name.
Activity — Body Language

Match the photograph with the emotion or attitude depicted in it.

__1. Open__
__2. Suspicious__
__3. Defensive__
__4. Frustrated__

a. [Image 1]  b. [Image 2]

 c. [Image 3]  d. [Image 4]
5. Analyzing the Situation

- **Active Listening**
  The Art of Active Listening really begins with your attitude. Remember to rephrase the content and reflect the feeling.

- **Patience and Persistence**
  The clerk in our scenario recognized that her main goal was to satisfy the customer, and she went to great lengths to make that happen.

Learn More — Patience and Persistence Quotes

Solving customer problems demands patience and persistence. People of great achievement provide a treasure of inspiration. In the space below, match the following quotes with the author. For the correct answers, refer to the Appendix.

a. Calvin Coolidge
b. Franklin D. Roosevelt
c. William Feather
d. Malcolm Stevenson Forbes

_1._ “Nothing in this world can take the place of persistence. Talent will not; nothing is more common than unsuccessful people with talent. Genius will not; unrewarded genius is almost a proverb. Education will not; the world is full of educated derelicts. Persistence and determination alone are omnipotent. The slogan ‘press on’ has solved and always will solve the problems of the human race.”

_2._ “Success seems to be largely a matter of hanging on after others have let go.”

_3._ “Diamonds are nothing more than chunks of coal that stuck to their jobs.”

_4._ “When you get to the end of your rope, tie a knot and hang on.”
Module 3 — Analyzing the Situation

Activity — Are You a Good Listener?

Answer the following questions on a scale of 1–5 with 1 being Agree and 5 being Disagree.

<table>
<thead>
<tr>
<th>Question</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Do you often finish statements for a customer who is speaking slowly?</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>2. Do you find it tiring or annoying to hear about the customer’s entire problem?</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>3. If you have a personal problem, does that problem occupy your thoughts while dealing with customers?</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>4. Do you feel uncomfortable asking customers to clarify what they’ve told you?</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>5. When a customer has a problem, do you often react before gathering all the facts?</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Total ____________

If, after you total your answers, you score less than 20, listening skills is an area for continued work. A score of 20 or higher shows that you practice good listening skills.
Module 3 Glossary

Art of Active Listening — Not only hearing words, but also understanding the meaning and feeling behind the words.

Empathic Listening — Term used by Stephen Covey in his book, *The 7 Habits of Highly Successful People*, which means that you understand what the speaker means and what he or she is feeling.

Empowerment — The skill of choosing how to think, feel and respond to a situation.

External Focus — When the customer service professional is focused on how he or she can help the customer.

Internal Focus — When the customer service professional is focused on himself rather than on what the customer wants.

Patience and Persistence — Tenacity in problem solving for the customer; committing to staying the course with every customer.

Rephrase and Reflect — Restate the content to show that you understand what was said, and to demonstrate that you care about what the speaker is saying.

Service Attitude — Focusing single-mindedly on helping the customer get what he or she wants or needs.
Module 3 Practice Test

1. True or False? In the opening scene, if the customer was being rude, Karen was justified in returning the attitude.

2. What are the four essential customer service skills covered in Part 1?
   a. Empowerment, The Service Attitude, The Art of Active Listening, Persistence
   b. Listening, Cooperation, Accuracy, Timeliness
   c. Learn the customer's names, Create relationship with customer, Know your product and Define needs
   d. All of the above.

3. True or False? Empowerment is the skill of choosing how to think, feel and respond to a situation.

4. Which statement is the most "TRUE"?
   a. A professional accepts responsibility for his or her own attitude, behavior and consequences of that behavior.
   b. A professional lets the customer set the tone for the conversation.
   c. A professional does not back down when she knows she is right.
   
5. True or False? The initial thought about an interaction sets the tone for the entire encounter.

6. True or False? A single-minded focus on company policy is the mark of a good customer service representative.

7. "Human beings, by changing the inner attitudes of their minds, can change the outer aspects of their lives." This quote by William James illustrates:
   a. Empowerment
   b. Service Attitude
   c. Listening
   d. Persistence

8. "A strong mental attitude will create more miracles than any wonder drug." This quote by Patricia Neal illustrates:
   a. Empowerment
   b. Service Attitude
   c. Listening
   d. Persistence
9. “You can make more friends in two months by becoming interested in other people than you can in two years by trying to get other people interested in you.” This quote by Dale Carnegie illustrates:
   a. Empowerment
   b. Service Attitude
   c. Listening
   d. Persistence

10. “If you treat people right they will treat you right — ninety percent of the time.” This quote by Franklin D. Roosevelt illustrates:
   a. Empowerment
   b. Service Attitude
   c. Listening
   d. Persistence

11. True or False? The following quote by Albert Einstein illustrates Service Attitude. “Weakness of attitude becomes weakness of character.”

12. True or False? The term empowerment, as it relates to customer service, means consciously choosing to think, feel, and respond positively.

13. Should the customer service focus be … ?
   a. Internal
   b. External

14. Being internally focused means:
   a. Concentrating on how to help the customer get what he or she wants.
   b. Concentrating on how to give the company what it needs.

15. Being externally focused means:
   a. Concentrating on how to help the customer get what he or she wants.
   b. Concentrating on how to give the company what it needs.

16. Read the following scenario and decide if the customer service representative is:
   a. Internally Focused
   b. Externally Focused

   Customer: Hello, this is John at Speedy Printers, Inc. A couple of weeks ago, I called in and ordered some new rollers for my press. I received them yesterday, but when I tried to install them this morning, one of them was damaged.

   CSR: Really? I don’t know how that could have happened. We make sure those rollers are packed well before we ship them.
Module 3 — Practice Test

Customer: Well, all I know is that the roller is damaged and I can't use it. I need you to ship one out to me today. My press is down, and I've got jobs I need to print.
CSR: You'll have to ship the damaged roller back to us before we can send you a new one.

17. Using the scenario from Question 16, how should the customer service representative have responded if he had assumed a service attitude?
   a. “Okay, John, I’ll help you out this one time, but in the future, just ship any damaged goods back and then we’ll replace them for you.”
   b. “John, you’re a good customer, and I apologize for the damaged roller. I’ll overnight a new roller to you so you’ll have it no later than 10:30 in the morning.”
   c. “Well, at least one of the rollers was okay.”

18. True or False? Service attitude is used to measure your sales.

19. Studies show that smiling and laughter:
   a. Can change your attitude for the better.
   b. Increase endorphins and neurotransmitters.
   c. Decrease the level of the stress hormone adrenaline.
   d. All of the above.

20. What happens when a customer service representative empowers himself or herself and adopts a service attitude?
   a. He or she takes responsibility for his or her thoughts, beliefs and actions.
   b. He or she focuses single-mindedly on assisting the customer.
   c. The customer walks away pleased.
   d. All of the above.

21. Which of the following is a listening skill?
   a. Remembering a person’s name.
   b. Accepting responsibility for your own attitude.
   c. Not taking the easy way out.

22. How can you understand the meaning and feeling behind your customer’s words?
   a. By empathic listening.
   b. By watching their body language.
   c. By making eye contact.
   d. All of the above.
Jim entered an electronics store, ready to buy a new TV. The store wasn’t busy, but the three salespeople on duty were engrossed in a conversation. Only one of the salespeople even looked up when Jim walked in. After five minutes, Jason approached Jim and asked if he needed any help. Jim said he was looking for a TV, probably a 32- to 36-inch screen. Jason glanced over at his coworkers, still trying to be a part of their conversation. “Did you see the ones we have on sale over there?” Jason asked. “Those are 27-inch screens. I’m looking for at least a 32-inch screen,” Jim responded. “Oh, those are right here. Let me know if you have any questions.” Jason said, returning to the counter and his friends. Which of the following customer service mistakes did Jason make?

a. Not greeting the customer when he walked into the store.

b. His distracted attitude when he did attempt to help Jim.

c. Not listening and hearing what the customer was saying.

d. Walking away from the customer instead of staying with him and giving him information about the product he was looking for.

e. All of the above.

How can you better understand what your customers mean and what they are feeling?

a. Rephrase and reflect.

b. React and retaliate.

c. Guess and hope for the best.

d. Ask them to repeat the question.

True or False? The two results of rephrasing the content are: It ensures you do in fact understand what was said and it demonstrates to the speaker you understand his or her content.

Assume the role of a customer service professional who received this complaint. “I ordered 250 3/4-inch widgets last month and you sent me 1/2-inch. Now I’m going to be behind in my production. What can you do about it?” How would you respond using the Rephrase and Reflect skill?

a. “Our records indicate you ordered 250 1/2-inch widgets. Would you like to place another order for some 3/4-inch widgets?”

b. “I’m sorry, the person who handled your order is no longer with our company. I’ll have to transfer you to our customer service manager.”

c. “I’m sorry you didn’t get what you ordered. I understand how that will put you in a bind on your production. Let’s see what we can do to get this corrected quickly.”

Through the Customer’s Eyes
Module 3 — Practice Test

27. Patience and Persistence require:
   a. Tenacity.
   b. Staying the course.
   c. Not taking the “easy way out.”
   d. All of the above.

28. Suppose Susan goes to a used-car dealership looking for a compact, fuel-efficient car. She’s on a strict budget, so price is a concern. The salesman, Bob, approaches Susan and asks how he can help her. Which of the following comments would illustrate the Rephrase and Reflect customer service skill?
   a. “So you’re looking for something that will get good gas mileage at a reasonable price, right?”
   b. “I’m sure we can find the right car for you. How about an SUV? We’ve got a great deal on this model!”
   c. “We really don’t have any compact cars on the lot right now. Why don’t you try ‘Cars Are Us’ two blocks down?”

29. Which of the following most accurately illustrates the customer service skill, Patience and Persistence?
   a. Patiently waiting for a customer to call you back.
   b. Searching for just the right product to fill the customer’s need.
   c. Telling the customer time is running out on that special offer.

30. Referring to the situation in Question 28, if Susan didn’t find a car she wanted to buy that day, how could Bob have used the Patience and Persistence customer service skill?
   a. Keep in mind Susan’s requirements and call her when he had something he thought she might like.
   b. Try to talk her into another car that was on the lot, even though it was above her price range.
   c. Not worry about it and concentrate on customers who are in a better position to buy right away.
Which of the following are skills a customer service professional uses to demonstrate his or her Art of Active Listening?

a. Make eye contact.
b. Have an attitude of wanting to help.
c. Truly understand the customer's problem.
d. Observe the customer's body language.
e. All of the above.

What are the two ways to comprehend the meaning, feeling and subtext of every customer's words?

a. Rephrase the content and Reflect the feeling.

True or False? Patience and Persistence are essential customer service skills defined by not taking the easy way out.

Match the following customer service skills to the proper description below.

1. Empowerment ______
2. The Service Attitude ______
3. The Art of Active Listening ______
4. Patience and Persistence ______

a. Problem solving requires tenacity.
b. Only you can choose how you respond.
c. A single-minded focus on helping the customer.
d. Understand what your customers really mean.

True or False? Empathic listening means to cry when you hear a customer's complaint.

See the Appendix for answers to the Practice Test. If you missed any questions, go back and review those sections before taking the certification exam.
Module 4

Essential Customer Service Skills, Part II

Core skills that will enhance customer satisfaction: Product Knowledge, Questioning Techniques, Providing Information and Creating Trust

In this module, we’ll continue to build on your learning with the remaining four essential customer service skills:

- Questioning Techniques
- Product Knowledge
- Providing Information
- Establishing Rapport, Building Goodwill and Creating Trust

These essential skills are at the heart of delivering great service. Each of these core concepts will be used as you complete the subsequent video training. Mastering the eight essential skills from Modules Three and Four is key to achieving your certification.
Module 4 Pretest

_1. True or False? The customer service professional who knows all there is to know about the company’s product or service will provide the greatest benefit to the customer.

_2. The key to understanding and solving problems is:
   a. Believing the customer is always right.
   b. Always allowing the customer to return the product.
   c. Asking the right questions in the right order.
   d. Referring all problems to a manager.

_3. True or False? Your customer wants a simple transaction and not a relationship with you and your company.

_4. Understanding the customer’s problem requires:
   a. Thoughtful questioning
   b. Good salesperson
   c. Giving the customer whatever they want.
   d. None of the above.
   e. All of the above.

_5. Which of the following is NOT an example of an open-ended question?
   a. How will this work for you?
   b. When do you need this to arrive?
   c. Which option works best for your situation?
   d. Do you like this?

_6. True or False? An open-ended question requires more than a “Yes” or “No” answer.

_7. The first set of questions used when determining a client’s needs should be:
   a. Broad in scope.
   b. Direct and to the point.
   c. Personal — to get to know them first.
   d. When they purchase the product or service.

_8. An example of a general question is:
   a. What are your needs?
   b. What is your favorite color?
   c. How many do you need?
   d. When are you making a buying decision?
Module 4 — Pretest

9. True or False? Product knowledge is another essential skill needed to be a truly effective customer service professional.

10. How can you become an expert about your product or service?
   a. Use your product.
   b. Practice selling with family and friends.
   c. Read about it.
   d. Study training materials.
   e. All of the above.

11. After you deliver the bad news to a customer, you should:
   a. Offer them something free.
   b. Tell them what you can do.
   c. Do nothing.
   d. Give them VIP coupons.

12. True or False? By telling customers what you can do, you indicate that you care about them and want to help.

13. Customers expect a customer service professional to (Select all that apply.)
   a. Be friendly.
   b. Make eye contact.
   c. Offer them sales.
   d. Listen to their needs.
   e. Promise them whatever they want.

14. True or False? Spending time with your supervisor and with people from different departments to get their perspective is NOT a good way to develop your knowledge base on the products or services offered by your company.

15. True or False? Open-ended questions are those which require a “Yes or No” response.
1. Questioning Techniques

Video example: Tech support for computer user

The initial challenge for most customer service professionals is to acquire a clear understanding of the customer’s problem. Understanding the customer’s problem usually requires a thoughtful questioning technique, a technique that elicits the necessary information AND comforts the customer.

- Service Attitude
  The Service Attitude is the foundation for the Key Word technique.

- Key Word Technique
  Listen for the key word in the customer’s statement.
  Use the key word in your response to the customer.

Two Types of Questions:
1. Open-ended questions are those requiring more than “yes” or “no” answers. They usually begin with How, Why, Who, When, Which or Where.
2. Closed-ended questions request specific answers — some form of “yes” or “no.”

Learn More — The Selling Wedge

“The Selling Wedge” is a questioning technique described by author Michael McGaulley in Selling 101. A pattern of questions begins with those that are broad in scope and are considered overview questions. Narrowing questions fall in the middle of the process. The wedge comes to a point when you ask value questions.
Activity — Key Word Technique Quiz

Keeping in mind the Key Word technique, see if you can identify the most appropriate response for these customer complaints. Select the correct response and check your results in the Appendix.

1. “I’m having problems with the hotel room you gave me.” If you were the hotel employee, your response would be:
   a. Tell me what your problems with the room are.
   b. Is the TV broken again?
   c. I’ll call housekeeping.

2. “I’m not sure the budget will cover your proposal.” If that were your client’s comment, would you say the most appropriate response would be:
   a. It’s what it’ll take to accomplish your objectives.
   b. It’s lower than the competition.
   c. How much is in your budget?

3. “I can’t get access to the pull-down menus in my word-processing program.” If your client called with this problem, would you say:
   a. What happens when you click on the pull-down menus?
   b. Have you tried restarting your computer?
   c. What version of software are you using?
2. Product Knowledge

- Must be comprehensive.
- Become an expert.
- To be a truly effective customer service professional, you must have comprehensive knowledge of your company and product.

Learn More — The Walter Chrysler story

In *The Book of Business Anecdotes*, author Peter Hay gives an account of an extraordinary mechanic with a passion for his product. Mr. Chrysler maintained his zest for mechanical work, often assisting stranded motorists long after his car company became successful.
Activity — Product Knowledge Tactics

Having Product Knowledge is a skill that makes a great customer service professional. Following is a list of tactics you can employ to become an expert in your field. Of course, not every tactic will be applicable in every situation, but the list should be a good start for your specific circumstance:

1. Read all available company literature about the product.
2. Check out competitor’s Web sites to find areas where your product or service is superior or weak.
3. Practice selling your product or service to your family or friends.
4. If possible, take your product home and experience it firsthand like a customer would.
5. Read trade magazines.
6. Spend time with your supervisor and with people from different departments to get their perspective on the product or service.
7. Talk to customers about experiences they’ve had with the product or service.
8. Observe peers in dealing with customers and model the positive behaviors.
9. Keep an attitude of openness as new information about the product or service or category becomes available.
10. If applicable, spend time with manufacturer’s reps to learn nuances from their perspective.

Pick three of these tactics and pledge to apply them to your situation right now. Write down the tactics you wish to employ.

1.___________________________________________________________________________________
2.___________________________________________________________________________________
3.___________________________________________________________________________________
3. Provide Information and Build Relationships

Video example: Broken clothes dryer needs repair.

- Be positive and tactful. When delivering bad news to a customer, it's better to state the truth as positively as possible.
- What can you do? When it is necessary to deliver bad news, be sure to follow it up with what you can do.
- Inform the customer. Keep your customer informed and provide information in a productive way. This will increase customer confidence and satisfaction.

Learn More — When “Yes” Isn’t the Proper Answer

- Begin by satisfying basic needs when you need to tell customers “No.” Everyone has basic needs such as the need to be acknowledged or recognized.
- Give customers some level of control to fit another need.
- State what alternatives are available — give your customers options.
- Tell customers what you CAN do, indicating that you want to help and you care about them.
Module 4 — Provide Information and Build Relationships

Activity — Positive vs. Negative Techniques

There are positive and negative ways of providing information to your customers. To emphasize this point, match the negative way of providing information in the left column with the more tactful way of providing the same information in the right column.

__ 1. No, there’s nothing I can do for you.  __ 2. You’re in the wrong department.  __ 3. I agree, you’ve got a problem.  __ 4. Call me back in an hour.  __ 5. That’s not my fault.

a. I’ll call you back.  b. I can research what happened.  c. I understand your frustration.  d. Let’s see what we can do about this.  e. This is who can help you.

The point is, there are positive and negative ways to give the same information. By remembering these responses when you have to deliver bad news, you’ll keep your customers not only satisfied, but also pleased and delighted! Refer to the Appendix to discover the right answers for this activity.
4. Establishing Rapport, Building Goodwill and Creating Trust

These essential skills begin with the "Be's"...

- Be punctual.
- Be friendly.
- Be empathetic.
- Use the customer's name.
- Appropriate humor can assist in building the relationship.

Module 4 Glossary

Building Customer Relations — Letting customers know you are listening and care about their needs.

Closed-ended Questions — Those questions that require a simple, specific answer, usually some form of "Yes" or "No."

Key Word — Technique which allows you to respond to the customer's needs by listening for a specific word in the customer's statement.

Open-ended Questions — Those questions which require more than a "Yes" or "No" response. They normally start with the following words: how, why, who, when, which or where.

Product Knowledge — Essential skill to becoming a great customer service professional. You must develop a comprehensive knowledge of company products and services.

Providing Information — Giving your customer the most current and up-to-date information regarding your product or service.
Module 4 Practice Test

1. As a review, what are the essential customer service skills? Select the best answer.
   a. Empowerment
   b. Service Attitude
   c. The Art of Active Listening
   d. Patience and persistence
   e. All of the above.

2. Positive words and phrases increase customer ___________ and ___________.
   a. Confidence and satisfaction
   b. Desire and need
   c. Loyalty and self-esteem
   d. Timeliness and attitude

3. Select the basic techniques used to build a relationship with customers?
   a. Establish rapport
   b. Building goodwill
   c. Generate great sales
   d. Creating trust
   e. Voice mail

4. The initial challenge for most customer service professionals is to:
   a. Guess what the customer needs.
   b. Acquire a clear understanding of the customer’s problem.
   c. Make sure the customer will return.
   d. Meet sales quota.

5. Understanding the customer’s problem requires:
   a. Thoughtful questioning.
   b. Good salesperson.
   c. Giving customers whatever they want.
   d. None of the above.
   e. All of the above.

6. The two techniques used to elicit information from a customer are:
   a. Key Word
   b. Listening
   c. Assertiveness
   d. Open-ended and closed-ended questions

7. True or False? To use the Key Word technique, you must be familiar with the marketing strategy for the product or service.
8. Select all that apply. By using the Key Word technique:
   a. You tell the customer you’re listening.
   b. You use language that the customer left out.
   c. You will sound like other customer service professionals.
   d. You will build customer relations.

9. True or False? The “Key Word” allows you to understand the heart of the problem.

10. True or False? As a customer service professional, to use the Key Word technique you must study all product information.

11. The foundation of the Key Word technique is:
    a. Service Attitude
    b. Professionalism
    c. Confidence
    d. Knowledge of product

12. Open-ended questions normally start with?
    a. How or why
    b. Who or when
    c. Where or which
    d. All of the above.

13. When you need a specific answer, you use which technique?
    a. Open-ended
    b. Closed-ended
    c. Key Word

14. Which of the following is NOT a closed-ended question?
    a. Does that happen every time?
    b. Do you like this color?
    c. Which options do you like best?
    d. Is that broken?

15. True or False? The key to understanding your customer’s problem is asking the right question the right way.

16. The pattern of questions you ask when determining your client’s needs should resemble:
    a. A pie-shaped graph
    b. A wedge
    c. A ladder
    d. Stairsteps

17. The questioning steps used to determine your client’s needs are:
    a. Broad in scope.
    b. Focusing questions.
    c. Value questions.
    d. All of the above.
Module 4 — Practice Test

18. True or False? As you ask general questions, you are attempting to distract the customer.

19. As you begin to NARROW your focus and determine your sales opportunities, what type of question might you ask? Select the best answer.
   a. How much can you afford to spend?
   b. What other products have you looked at?
   c. How often do you have these needs?
   d. What colors do you prefer?

20. The final line of questioning is designed to:
   (Select all that apply.)
   a. Zero in on the core problem and opportunity.
   b. Make the sale.
   c. Identify the decision maker.
   d. Position your product or service to solve the client’s problem.

21. True or False? A superior customer service representative will have knowledge of the industry, company information and all products and services provided by the company.

22. When giving bad news to a customer, a typical customer prefers that you:
   a. Hedge the issue.
   b. Tell the truth and provide solutions.
   c. Refer him or her to another customer service representative.
   d. Sell him or her something else.

23. True or False? It is better to state the truth as positively as possible and provide clear information, even if the customer does not like it, than not to tell the truth.

24. Sometimes “No” is the only way to answer the customer. Which is the best option when needing to deliver the “No” answer?
   a. I realize you would prefer the XYZ model, and that it will meet your current needs. However, we are currently not stocking that model and are replacing it with the XYZ Deluxe Model.
   b. No, that’s not available. Will that be all?
   c. Sorry, we are out of that model. Please try again next week.
   d. I’ve heard ABC Company still has a few of those old models left. Try there.

25. True or False? By stating what alternatives are available, the customer might shop somewhere else.
26. There are negative and positive ways of handling tough situations. Select True or False based on the positive or negative style of the phrase.

   a. “There’s nothing I can do for you” is a positive way.
   b. “What I can do is …” is a positive way.
   c. “I understand your frustration …” is a negative way.
   d. “You have a real problem” is a negative way.

27. True or False? By using positive language when you have to deliver bad news, you’ll let the customer know you are not a negative person.

28. True or False? Promptness and timeliness are the first steps to begin a great relationship with your customer.

29. True or False? “We’ll never be able to get it to you by then” is an example of a positive response to your customer.

30. True or False? When new products or services are introduced, you must first try to sell the old-version products.

31. True or False? Timely use of the Key Word technique, and appropriate use of open-ended and close-ended questions will provide a better understanding of what your customer needs.

32. True or False? Open-ended questions are those which require a “Yes” or “No” response.

33. True or False? A closed-ended question is a rhetorical question.

34. True or False? Customers want as little interference with customer service professionals as possible.

35. True or False? Customers want as little interference with customer service professionals as possible.

The key to understanding and solving your customer’s problem is:

   a. Asking the right questions in the right order.
   b. Understanding your customer’s budget.
   c. Being on time for appointments.
   d. Creating a warm atmosphere.

See the Appendix for answers to the Practice Test. If you missed any questions, go back and review those sections before taking the certification exam.
Module 5
Handling Complaints and Dealing With Angry People

Learn to deal with difficult situations and create loyal, lifetime customers

No matter what your title or the type of company you work for, everyone must deal with upset or angry customers from time to time. How well you handle these situations is a true measure of the difference between an average employee and a true customer service professional.

This module will teach you five key concepts:

1. The reason you should ‘bother’ with difficult customers.
2. Focus on saving the customer — not the sale.
3. Three steps to customer delight.
4. Tools for defusing anger and aggression.
5. How to stay calm in stressful situations.
Module 5 Pretest

_1. A disgruntled customer will tell approximately how many people about their unpleasant experience with you?_
   a. 1 to 5
   b. 5 to 10
   c. 15 to 20
   d. 20 to 30

_2. True or False? When customer complaints were successfully resolved, the complaining customer usually continued to do business with the company.

_3. If customer complaints are resolved quickly, what percentage of those customers will remain loyal to your company?_
   a. 10 percent
   b. 25 percent
   c. 50 percent
   d. 90 percent

_4. Complete this sentence: “Focus on saving the customer, not …”
   a. Saving the company.
   b. Saving the sale.
   c. Saving face.

_5. A customer service professional is sensitive to even the slightest implication of:
   a. Customer dissatisfaction.
   b. Customer loyalty.
   c. Customer betrayal.

_6. True or False? Quick resolution to complaints is the key to client satisfaction.

_7. When you apologize to a customer for something you or your company did to upset them, it must be done with:
   a. Documentation.
   b. Sincerity and grace.
   c. Your supervisor’s permission.

_8. Which of the following are important when apologizing?
   a. Body language
   b. Tone of voice
   c. Attitude
   d. All of the above.

_9. How much of what is communicated is nonverbal?
   a. Less than 10 percent
   b. Approximately 25 percent
   c. Approximately 50 percent
   d. Over 90 percent
Module 5 — Pretest

__10. True or False? Regardless of who is to blame for the problem, the customer service professional should take responsibility for solving the problem.

__11. True or False? A customer service professional who displays empathy can positively affect the outcome of any potentially negative customer encounter.

__12. An apology must be:
   a. Documented
   b. Accepted
   c. Sincere

__13. True or False? Anger is an emotion that seldom looks for someone or something to blame.

__14. True or False? A customer service professional should not accept responsibility for fixing the problem if it was not the fault of his or her company.

__15. True or False? A customer service professional always concentrates on saving the customer, not on saving the sale.
1. Why Bother With Difficult Customers?

- Disgruntled customers will tell 15–20 people about their experience.
- Complaints are really opportunities.
- Difficult customers can become loyal, profitable, long-term customers, if handled effectively.

Learn More — The Risk of Silent Dissatisfaction

- At any given moment, 25 percent of your company’s customers are upset enough to quit doing business with your company.
- Only 5 percent of these customers will voice their complaint with you.

Activity — Measuring How You Feel About Difficult Customers

What kind of attitude do you have when approached by difficult customers? Read the following statements and rate them on a scale of 1 to 5, with 1 being Agree and 5 being Disagree.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. This guy’s driving me nuts. I need to get rid of him.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>2. The customer is trying to pull a fast one on me.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>3. It’s not my fault. Someone else should deal with it.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>4. I don’t have to be polite to a rude customer.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>

Total _____________

Total your score and check that against the scale in the Appendix.
Module 5 — Why Bother With Difficult Customers?

2. How to Handle Complaints and Deal With Angry Customers

- Three steps to customer delight: 1. Listen, 2. Apologize, 3. Fix
- Focus on saving the customer, not the sale.

Learn More — More on Listening Quotes

Reflect on the following quotes about listening. Jot down any that have any particular significance to you and post the quote where you’ll see it every day.

- “Courage is what it takes to stand up and speak; courage is also what it takes to sit down and listen.” — Carl Hermann Voss
- “Everyone hears what you say. Friends listen to what you say. Best friends listen to what you don’t say.” — Unknown
- “Listen or your tongue will keep you deaf.” — Native American Proverb
- “You cannot truly listen to anyone and do anything else at the same time.” — Dr. M. Scott Peck
- “When people talk, listen completely. Most people never listen.” — Ernest Hemingway
- “We have two ears and one mouth so that we can listen twice as much as we speak.” — Epictetus
- “Listening, not imitation, may be the sincerest form of flattery.” — Dr. Joyce Brothers
Activity — The Right Attitude

When dealing with difficult customers, it's important that you have the right attitude and save the customer. Read the statements below, then rephrase each statement by matching it with the appropriate choice. To check your answers, refer to the Appendix.

__1. What a jerk!

__2. Is this guy dumb or what?

__3. This really isn't my problem.

__4. Why do I get the angry customers?

a. What can I do to satisfy this customer?
b. Let's see if I can calm this guy down.
c. I probably need to explain this in a different way.
d. We must have done something to really upset this guy.
Module 5 — Analyze the Situation

3. Analyze the Situation

Video example: Online ordering

Two critical concepts:
1. Save the customer, not the sale.
2. Three steps to customer delight: Listen, Apologize, Fix.

If a customer has been inconvenienced, it’s a good idea to compensate him or her somehow for that inconvenience.

Learn More — Review Listening Skills

The Art of Active Listening starts with your attitude — ninety percent of what you communicate is nonverbal.

1. Observe your own body language.
2. Observe your customer’s body language.
3. Set the goal of truly comprehending the meaning, feeling and subtext of every customer’s words.
Activity — Listen, Apologize, Fix Worksheet

Part A: In the first column below, write in three things that make your customers angry.

Part B: In the second column, write in the exact words of your apologies.

Part C: Write how you will communicate your solutions in column three.

| List three things about which your customers get angry. | Write out the exact words of your apologies. | How will you communicate your solutions? |
4. Defusing Anger and Aggression

- Listen.
- Empathize — use empathetic phrases:
  - “I understand how frustrating this can be.”
  - “I know what you mean.”
  - “This must be upsetting.”
  - “I hear what you’re saying.”
  - “I understand why you feel this way.”
- Don’t return aggression.
- Admit mistakes.
- Accept responsibility.
- Take action to solve the problem.

Staying Calm Under Stress

The most effective techniques for defusing anger and aggression include:
1. The “triage” attitude: Treat angry customers as if they need emergency service.
2. Depersonalize the interaction.
3. Focus on the core problem and the appropriate solution.

Module #5 Glossary

Depersonalize — To concentrate on the problem and the solution — not on the personality of the customer.
Empathy — Showing an understanding or an appreciation of another person’s situation or point of view.
Triage — In an emergency, sorting those needing assistance according to who needs assistance most.
Module 5 Practice Test

1. Complete the following sentence: A sale is a one-time transaction; a customer is a lifetime ...
   a. Asset.
   b. Commitment.
   c. Obligation.

2. What are the three steps that lead to customer delight?
   a. Listen.
   b. Apologize.
   c. Bribe.
   d. Fix.
   e. Understand.

Read the scenario below, and answer the questions that follow:

Jan placed an order online for some wallpaper. She was notified by e-mail that her order had been shipped and would arrive no later than November 1st. She scheduled her wallpaper hanger to do the job on November 3rd. When she received the shipment on the 1st, she discovered that out of 10 rolls of wallpaper, three were the wrong color. She immediately e-mailed the manufacturer: “I received my shipment today, but three of the 10 rolls were not what I ordered! I have a wallpaper hanger coming in two days, and now I will have to reschedule and will probably have to wait weeks to get on his schedule again. I am very disappointed with your service. I would like to get this resolved to my satisfaction ASAP.”

Two days later, Jan received the following e-mail: “Thank you for your e-mail. If you would ship the incorrect rolls back to us at the address listed on the packing slip, we will be happy to send you the correct pattern. You can expect delivery approximately 10 days after we receive your returned rolls. Thank you for your order.”

3. True or False? Jan’s core problem was that she had already scheduled a wallpaper hanger and didn’t have all the paper she needed.

4. Referring to the scenario, which of the following are mistakes that the CSR made in her response?
   a. Did not apologize for the error.
   b. Did not solve Jan’s core problem.
   c. Did not empathize.
   d. Did not compensate the customer for the inconvenience.
   e. All of the above.
Module 5 — Practice Test

5. Which of the following statements would have best demonstrated empathy?
   a. “I apologize for the error.”
   b. “Let’s see how we can get this resolved.”
   c. “I know what an inconvenience this error has caused you.”
   d. “Our shipping department is usually accurate, but mistakes do happen.”

6. Which of the following would have solved Jan’s core problem?
   a. “We’ll overnight you the correct rolls so you won’t have to reschedule your paper hanger.”
   b. “We’ll credit your account for those three rolls.”
   c. “We’ll give you a 10 percent discount on your next order with us.”

   a. Within a week.
   b. Within 24 hours.
   c. On the spot.

8. At any given moment, approximately what percentage of the customers of an average company are upset enough with the company to stop doing business with them?
   a. 5 percent
   b. 10 percent
   c. 25 percent
   d. 50 percent

9. Of that number of unhappy customers, approximately what percent will actually voice their complaints to the company?
   a. 5 percent
   b. 10 percent
   c. 50 percent
   d. 100 percent

10. True or False? The lifetime value of a customer is the average age of your customer.
11. How can customer complaints be opportunities?
   a. Complaints point out areas for improvement that might otherwise go unaddressed.
   b. Complaints can be used to sell other products.
   c. Complaints can help management get rid of bad employees.
   d. Complaints can help you upgrade a product line.

12. Why bother with difficult customers?
   a. Difficult customers can become loyal, profitable, long-term customers if the complaints are handled professionally.
   b. Not satisfying a difficult customer can cost the company business and prospective customers.
   c. Difficult customers are a challenge and fun to deal with.
   d. When dealing with a difficult customer, you are allowed to yell, which is good for your self-esteem.

13. Select the principles and techniques central to handling complaints and dealing with angry customers.
   a. Focus on saving the customer, not on saving the sale.
   b. Three steps to customer delight: Listen, apologize and fix.
   c. Tools for defusing anger and aggression.
   d. How to stay calm in stressful situations.
   e. All of the above.

14. What are the two distinct components of listening?
   a. Attitude
   b. Skill
   c. Nonjudgmental
   d. Good posture

15. Which of the following are techniques for defusing anger and aggression? Select all that apply.
   a. Listening.
   b. Empathizing.
   c. Not returning aggression.
   d. Agreeing when the company is wrong.
   e. Accepting responsibility for the error.
   f. Taking immediate action to solve the problem.
   g. All of the above.
Module 5 — Practice Test

16. Which of the following is NOT a component of the skill of listening?
   a. Attitude
   b. Skill
   c. Self-confidence

17. True or False? Empathy is when you show understanding or appreciation of another person’s situation or point of view.

18. Empathy doesn’t necessarily mean you have to agree — just:
   a. Understand
   b. Respond

19. The best way to express empathy to the customer is to use empathetic phrases such as:
   a. “It’s not our fault this happened.”
   b. “I understand why you feel this way.”
   c. “I’m afraid I can’t help you with this.”

20. Which of the following is one of the most damaging things you can do as a customer service professional?
   a. Return aggression.
   b. Admit the company made a mistake.
   c. Refund money.
   d. None of the above.

21. When dealing with an angry and aggressive customer, do not:
   a. Back down.
   b. Take it personally.
   c. Ask too many questions.

22. Which two things should you do to become a service hero for your customers?
   a. Admit you or your company is wrong.
   b. Give them free merchandise.
   c. Give them bonus coupons.
   d. Accept responsibility for fixing the problem.
   e. Arrange for a free lunch at their favorite restaurant.
Review the following situation and answer the questions that follow:

While on a business trip, Dan checked into a hotel he had stayed in several times before. When he went to his room he was not pleased with what he saw: the bathroom had not been adequately cleaned, the trash hadn’t been emptied and the room was not a non-smoking room as Dan had requested. It had not been a good day for Dan, and this was not what he needed. He went straight to the registration desk and exploded, “What is your explanation for sending one of your guests to a room like that? The room is filthy, and it reeks of smoke! I’ve been a good customer for years, but I’ll never stay here again if this is what I can expect! And I’ll make sure nobody else from my company stays here either!”

23. Select three skills the customer service professional could use to defuse Dan’s anger.
   a. Listen.
   b. Reflect it.
   c. Apologize.
   d. Fix the problem.
   e. Shrug his/her shoulders.
   f. Blame it on someone else.

24. Which of the following statements would best illustrate compensating Dan for his inconvenience?
   a. “I have another room for you that will be to your liking.”
   b. “I’m so sorry this happened.”
   c. “Here’s a certificate for a complimentary meal in our dining room.”
   d. “This will never happen again, I assure you.”

25. Which of the following statements best illustrates taking immediate action to solve the problem?
   a. “I’ll have the bellman take your bags to a satisfactory room right away.”
   b. “I’ll call a maid immediately to clean your room.”
   c. “I’m sorry, that’s the only room we have available, but we will not charge you full price for the room.”
Module 5 — Practice Test

26. Which of the following statements could the customer service professional make to defuse Dan’s anger?
   a. “We made a mistake sending you to a room like that.”
   b. “That’s our fault, and I’m going to make it up to you.”
   c. “I’m so sorry. I know that after working a long day, this is the last thing you need to deal with.”
   d. All of the above.

27. What are the three ways to stay calm in a stressful situation?
   a. Adopt the triage attitude.
   b. Hum to yourself.
   c. Find someone else to deal with it.
   d. Depersonalize the interaction.
   e. Focus on the core cause and the appropriate solution.
   f. Focus on something else.

28. True or False? The definition of a Triage Attitude is: in an emergency, sorting those needing assistance according to who needs assistance most.

29. Often, a customer service professional will receive the brunt of a customer’s hostility because:
   a. The customer service professional has usually caused the problem.
   b. The customer is having a bad day.
   c. The customer service professional is the closest target.

30. Which of the following is NOT a technique to defuse anger and aggression?
   a. Listening.
   b. Returning aggression within certain boundaries.
   c. Accepting responsibility for the error.
   d. Taking immediate action to solve the problem.

31. True or False? You can “depersonalize” an interaction with an angry customer by focusing on the problem and solution — not on the personality of the customer.
32. Match the customer service skills in the left-hand column with the statement that best illustrates that skill in the right-hand column.

__1. Listen  a. “I’m sorry about our error on your order.”
__2. Empathy  b. “I see what the problem is.”
__3. Apology  c. “I understand how this must have inconvenienced you.”
__4. Fix the problem  d. “I will credit your account immediately.”
__5. Follow through  e. “Your account balance is now correct on our computer.”

33. Why is losing a customer so detrimental to a company?

a. Because that lost customer will probably tell anywhere from 15 to 20 people about their unpleasant experience with you.
b. Because you lose a sale.
c. Because you won’t meet your monthly sales goals.

34. True or False? A difficult customer can become a profitable, long-term customer.

35. Which of the following statements is the opposite of “winning the battle and losing the war”?

a. Saving the sale, losing the customer.
b. Saving the customer, not the sale.
c. Saving money, losing the sale.

See the Appendix for answers to the Practice Test. If you missed any questions, go back and review those sections before taking the certification exam.
Module 6

Customer Service as a Strategic Marketing Tool and Customer Service Teams

Customer service is an essential part of strategic marketing. Improve productivity, morale and customer satisfaction with effective teams. Enhance overall company performance and service quality.

In this module you’ll learn:

- How great customer service adds value and differentiates your company.
- How to help customers get more utility and enjoyment from their initial purchase.
- What you can do to become a great team member.
Module 6 Pretest

1. True or False? Companies that give great customer service are more successful.

2. Cost involves the money the customer invested, but it also includes:
   a. Time spent.
   b. Aggravation endured.
   c. The inconvenience and hassle involved.
   d. All of these.

3. A general rule of thumb is to keep the costs of all add-ons at less than ________ of the total initial purchase.
   a. 40 percent
   b. 50 percent
   c. 60 percent
   d. 80 percent

4. The key part of listening is:
   a. Not disagreeing.
   b. Keeping an open mind.
   c. Making eye contact.

5. Listening is only powerful and effective if it is:
   a. Empathic.
   b. Authentic.
   c. Rephrased.
   d. Focused.

6. True or False? Trying to be ready with an answer while the other person is speaking is a sign of good listening.

7. True or False? You can't differentiate yourself from your competition with great customer service.

8. True or False? When a problem comes up, good team members don't blame others. Instead, they take responsibility for solving it.

9. ________ of communication is through the speaker's body language and tone of voice.
   a. 90 percent
   b. 70 percent
   c. 50 percent
   d. 10 percent

10. True or False? Poor customer service decreases the “value” of your product.
1. Great Service = Great Success

Video Example: Bank teller and late customer

- Great service adds value.
- Poor service decreases value.
- Value = Benefits minus Cost.
- Benefits are the entire range of satisfactions from the product or service.
- Costs are the price paid, time consumed and aggravation endured.
- Great customer service is a point of differentiation.

Learn More — Stew Leonard’s Story

Leonard’s carries only 1,000 products, yet has sales over $150 million a year. Leonard’s philosophy is summed up on a chiseled rock in front of the store, which says:

- Rule #1 — The customer is always right.
- Rule #2 — If the customer is ever wrong, re-read rule #1.

Mission statement: “Our Mission Is to Create Happy Customers.”
Activity — Match Companies With Their Slogans

Many well-known companies have recognized how customer service can separate them from their competition. Throughout the years, many have touted their customer service in their advertising slogans. Match the following companies known for their service with their famous slogans. Compare your answers with those found in the Appendix.

a. Texaco
b. Burger King ('70s)
c. Avis ('60s)
d. United Airlines
e. Allstate
f. Ace

_1. _________ is the place with the helpful hardware man.
_2. _________ We’re number two. We try harder.
_3. You’re in good hands with _________.
_4. Have it your way _________
_5. You can trust your car to the man who wears the star _________
_6. Fly the friendly skies of _________.
2. Selling Complementary Products

An aspect of great customer service that’s often overlooked but very important is offering complementary services or products. Complementary products and services are about additional benefits that your customers receive through more utility or enjoyment from the initial purchase. There are four techniques to offering complementary products or services.

1. Build the foundation.
   • Momentum buying

2. Make it pertinent.
   • Relevant to original purchase

3. Keep cost of add-ons to less than 50 percent of original purchase.

4. Be assumptive.
   • Assume people want the maximum benefit from their purchases

Review

• Customer Service adds value.
• Customer Service is the only sustainable advantage.
• Offer complementary products.
3. Customer Service Teams

Video example: Call-center team meeting

Approaching customer service as a team effort can improve your individual and company performance.

Yogi Berra said, “You got to be careful if you don’t know where you’re going, because you might not get there.”

Teams provide a platform for:

- Goal setting and measurement
- Healthy competition
- Peer support and mentoring

Example: Call-center team meeting discussion items — log-on time, rings till answer, abandon rate and average call duration.

Learn More — Team Quotes

The topic of teams and teamwork has been fodder for experts across the years. Read the following quotes about teams, teamwork and cooperation. You may want to jot down any that have particular meaning to you and post them in your work area.

“The speed of the boss is the speed of the team.”
— Lee Iacocca

“Management means, in the last analysis, the substitution of thought for brawn and muscle, of knowledge for folklore and superstition, and cooperation for force.”
— Peter Drucker

“The important thing to recognize is that it takes a team, and the team ought to get credit for the wins and the losses. Successes have many fathers, failures have none.”
— Philip Caldwell

“Every kind of peaceful cooperation among men is primarily based upon mutual trust and only secondarily on institutions such as courts of justice and police.”
— Albert Einstein

“Team: Together Everyone Achieves More.”
— Anonymous
## Module 6 — Customer Service Teams

### Activity — Rate Team Behavior

Listed below is a set of characteristics or behaviors. Using a 5-point scale with 5 being “agree” and 1 being “disagree,” rate how well you feel each team member demonstrates the characteristic or behavior.

<table>
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<th>Team Member</th>
<th>Participated</th>
<th>Open</th>
<th>Listened</th>
<th>Positive</th>
<th>Supportive</th>
<th>Responsible</th>
<th>Total</th>
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<tr>
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<td>1  2  3  4  5</td>
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</table>
4. Characteristics of Good Teammates

To avoid the problems witnessed in the call-center team, remember these important items:

- Participation — Participating is your responsibility.
- Sharing thoughts and ideas — Share openly and authentically with others regarding your opinions and feelings.
- Listening — Much of the trouble we have communicating with others is because of poor listening skills.

Rate the second meeting

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<th>Team Member: Walt</th>
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<td>Total</td>
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</table>
Module 6 — Characteristics of Good Teammates

Learn More — Review Key Characteristics of Good Team Members

- They participate at an appropriate level.
- They have a positive attitude.
- They are open-minded.
- They are supportive and responsible.

Activity — Examples of Great Teams

The first thing many of us think of when we hear the word team is sports. Sports teams often show us that the sum of the parts is greater than the whole. Each of the following teams is an illustration of such synergy, using cooperation and teamwork to overcome enormous odds to obtain a goal. See if you can match up the goal with the team that achieved it. To check your answers, turn to the Appendix.

a. 1969 New York Mets
b. 1988 Kansas Jayhawks
c. 1980 U.S. Olympic Hockey Team
d. 1992 Buffalo Bills

__1. Beat the heavily favored Soviet team for the Gold.

__2. The lowest seeded team ever to win the NCAA basketball tournament.

__3. This team was 9-1/2 games behind the front-runner 17 days before the end of the season, yet went on to capture the lead on the last day of the season.

__4. Overcame a 32-point halftime deficit to win the American Football Conference title.
Module 6 Glossary

Benefit — Something the customer wants to receive from a product or service.

Complementary Product Selling — Offering the customer the opportunity to add value and benefits to their purchase with an additional lower cost complementary product or service.

Costs — The price paid, time consumed and aggravation endured.

Differentiation — Using good customer service, product knowledge, quality and added benefits to make your company products and services more compelling.

Momentum Buying — The pattern of building enthusiasm with each additional purchase as a stimulus to buy more.

Teamwork — Participation in a platform of goal setting and measurement, healthy competition, peer support and mentoring.

Value — Benefit the customer receives minus the cost the customer must pay.
Module 6 — Practice Test

1. What is the key advantage of great customer service?
   a. Great customer service adds value.
   b. It differentiates the company.
   c. It provides more sales opportunities.
   d. All of the above.

2. True or False? Good customer service differentiates one company from another by making it stand out from the competition in a way that really matters to the customers.

3. True or False? In his book, *Front-Line Customer Service*, author Clay Carr defines the concept of “value” as the benefit the customer receives minus the cost the customer must pay. Customers are attracted and retained by superior value.

4. Define “benefit” as it relates to customer service.
   a. Benefit is something the customer wants and receives from a product or service.
   b. What you are entitled to as a full-time employee.
   c. The bonus the customer receives after buying a product.
   d. All of the above.

5. ________ is the difference between benefits and costs. It is what attracts and keeps customers.
   a. Value
   b. LTV
   c. Sale price
   d. Per diem

6. ________ is one of the best ways to separate your company from the competition.
   a. Low price
   b. Great customer service
   c. Better value
   d. Benefit

7. True or False? The concept of offering complementary products or services is an aspect of great customer service that is often overlooked but very important.

8. Select each item that is a benefit your customers could receive if you offer them complementary products.
   a. More utility from initial purchase.
   b. More enjoyment from initial purchase.
   c. Time savings.
   d. More convenience.
   e. Less frustration.
   f. All of the above.
9. Which of the following are key complementary offering techniques?
   a. Build the foundation.
   b. Make it pertinent.
   c. Make the complementary products lower in cost than the initial purchase.
   d. Be assumptive.
   e. All of the above.

10. True or False? The customer may change his or her mind about the entire sales transaction if the overall cost gets too high.

11. True or False? The power in the buyer-seller relationship shifts to the buyer when product is at parity and choices are proliferated.

12. How can teamwork improve performance?
   a. Teams create a competitive environment.
   b. Teams provide a platform for goal-setting and measurement, healthy competition and peer support and mentoring.
   c. Teams allow others to cover for you.
   d. Teamwork allows you to know those you work with.
   e. All of the above.

13. True or False? Much of the trouble we have communicating with others is because of poor listening skills.

14. Poor listening habits include: (Select all that apply)
   a. Jumping to conclusions.
   b. Thinking about what they are going to say next while the other person is speaking.
   c. Being easily distracted or prone to daydreaming.
   d. Interrupting people.
   e. All of the above.

15. True or False? According to author Stephen Covey, empathic listening is listening not only to the words being spoken, but also to the meaning and feeling behind the words.

16. Select the key characteristics of good team members.
   a. They participate at an appropriate level.
   b. They have a positive attitude.
   c. They listen.
   d. They use the technique of Rephrase and Reflect.
   e. They are open-minded.
   f. All of the above.

17. True or False? “Benefit” is the entire range of satisfactions a customer gets from a product or service.
Module 6 — Practice Test

18. Describe what participating as a team member at an appropriate level means:
   a. To share openly.
   b. To share authentically.
   c. To avoid dominance of the team.
   d. All of the above.

19. Many communication problems stem from
   a. Too many people talking at once.
   b. Poor listening.
   c. Talking too softly.
   d. Speaking too loudly.

20. True or False? A supportive team member trusts and has genuine concern for other team members.

21. Rephrasing the content of what a speaker has just said is ________ listening.
   a. Empowered
   b. Empathic
   c. Authentic
   d. Repeat

22. True or False? Listening is most powerful when you demonstrate that you want to understand the speaker’s history.

23. True or False? In order to truly understand another’s communication, you must have the attitude that you want to understand.

24. Participation, ________ attitude and listening skills are all key characteristics of good team members.
   a. Negative
   b. Complacent
   c. Positive
   d. Competitive

25. Being ________-minded is crucial to listening. Don’t jump to conclusions until you have all the necessary information.
   a. Open
   b. Closed

26. True or False? Team members don’t blame one another. They are supportive and responsible.

27. True or False? Including great customer service as a part of the “value” of your product is not being realistic.
Through the Customer’s Eyes

28. Offering complementary products during a sale is not fundamentally about getting more ________ from the customer.
   a. Time
   b. Value
   c. Dedication
   d. Money

29. True or False? Momentum buying means being more receptive to adding to a purchase with a complementary product, once the commitment to the initial purchase has been made.

30. Representatives can provide an invaluable service by helping the customer understand the ________ of additional products or services.
   a. Prices
   b. Benefits
   c. Value
   d. Instructions

See the Appendix for answers to the Practice Test. If you missed any questions, go back and review those sections before taking the certification exam.
Appendix

Module 1

Module 1 Pretest

1. c
2. False
3. a, b, c, d
4. b
5. b
6. b, c, e
7. b
8. True
9. False
10. True

Activity — Benefit vs. Cost Worksheet

Our panel of customer service experts rated this exchange at only 21. Product quality and price weren’t an issue, but convenience, consideration of the customer’s time and employee attitude were all inadequate.

If you scored this interchange below 21, you are really committed to providing good service and you won’t accept inferior service when it happens to you.

If you rated Dan’s performance significantly higher than our panel, you may want to go back and watch this scene again. Look carefully for all the opportunities Dan missed to really meet Mark’s needs and provide good customer service.

Activity — Customer Service Statistics

The answer is d. All of those statistics are correct.

More reasons why customer service matters.

Module 1 Practice Test

1. c
2. c
3. e
4. c
5. c
6. a
7. a, b, c
8. a, b, c
9. a, b, c, d
10. a
11. a, c
12. a, d, f, g
13. 1b, 2a, 3c
14. b
15. a
16. True
17. False
18. True
19. b
20. b
Module 2 Pretest

1. False
2. True
3. True
4. False
5. c
6. True
7. True
8. c

Activity — People Want Good Service

1. c
2. d

Activity — Promptness

1. A customer service professional makes every effort to please every customer.
2. Your experience as a customer service professional can be valuable. However, the customer service professional never jumps to conclusions about what a customer wants or needs.
3. Regardless of how the customer responds, a customer service professional strives to make every customer encounter quick, easy and enjoyable.
4. Every customer interaction is an opportunity to increase your skills as a customer service professional.
5. Treating each customer as an individual will increase your effectiveness as a customer service professional.
Module 3 Pretest
1. True
2. c
3. c
4. c
5. b
6. a
7. a
8. b
9. c
10. b
11. False
12. a
13. True
14. d
15. a

Activity — The Service
Attitude Quiz
1. The answer is a. A customer service representative is always focused on satisfying the customer BEFORE ALL ELSE. Of course, other issues will need to be addressed AFTER the customer's problem has been resolved.
2. The best answer is c. "First let's get you some signs on the way . . . " Solving the customer’s problem is always the first priority of a customer service professional.
3. The correct answer is a. While it's true that some customers may try to take advantage of you and your company, they are generally rare. You choose how you think and feel, and if you choose to think, "This person has a problem and I have a chance to help," you will be more effective (and happier) in your work.

Activity — Attitude Quotes
1. e
2. a
3. c
4. d
5. b

Activity — Body Language
1. c
2. b
3. a
4. d

Learn More — Patience and Persistence Quotes
1. a
2. c
3. d
4. b
Module 3 Practice Test
1. False
2. a
3. True
4. a
5. True
6. False
7. a
8. a
9. b
10. b
11. False
12. True
13. b
14. b
15. a
16. a
17. b
18. False
19. d
20. d
21. a
22. d
23. e
24. a
25. True
26. c

27. d
28. a
29. b
30. a
31. e
32. a
33. True
34. 1b, 2c, 3d, 4a
35. False

Module 4
Module 4 Pretest
1. True
2. c
3. False
4. a
5. d
6. True
7. a
8. a
9. True
10. e
11. b
12. True
13. a, b, d
14. False
15. False
Appendix

Activity — Key Word Technique Quiz
1. The correct response is a. “Tell me what your problems with the room are?” This response uses the key word “problem” and is open-ended so you get more information on specifically what the problem is.
2. The correct answer is c. “How much is in your budget?” This is an open-ended question, which yields you more information. It uses the key word “budget” making your customer feel comfortable that you are listening to him or her.
3. The correct answer is a. “What happens when you click on the pull-down menus?” This uses the key word “pull-down menus” and is an open-ended question that prompts the customer for more information regarding their problem.

Activity — Positive vs. Negative Techniques
1. d
2. e
3. c
4. a
5. b

Module 4 Practice Test
1. e
2. a
3. a, b, d
4. b
5. a
6. a, d
7. False
8. a, d
9. True
10. False
11. a
12. d
13. b
14. c
15. True
16. b
17. d
18. False
19. c
20. a, d
21. True
22. b
23. True
24. a
25. False
26. a False, b True, c False, d True
27. False
28. True
29. False
Through the Customer’s Eyes

30. False
31. True
32. False
33. False
34. False
35. a

Module 5

Module 5 Pretest
1. c
2. True
3. d
4. b
5. a
6. True
7. b
8. d
9. d
10. True
11. True
12. c
13. False
14. False
15. True

Module 5 Practice Test
1. a
2. a, b, d
3. True
4. e
5. c
6. a
7. c
8. c
9. a
10. False
11. a
12. a, b
13. e
14. a, b
15. g
16. c

Activity — Measuring How You Feel About Difficult Customers

If your score is 15 or greater, congratulations. You understand the importance of dealing with difficult customers. If your score is less than 15, consider adjusting your thinking and realize the importance of dealing with difficult customers.

Activity — The Right Attitude
1. d
2. c
3. a
4. b
Appendix

17. True
18. a
19. b
20. a
21. b
22. a, d
23. a, c, d
24. c
25. a
26. d
27. a, d, e
28. True
29. c
30. b
31. True
32. 1b, 2c, 3a, 4d, 5e
33. a
34. True
35. b

Module 6
Module 6 Pretest
1. True
2. d
3. b
4. b
5. b

Activity — Match Companies With Their Slogans
1. f
2. c
3. e
4. b
5. a
6. d

Activity — Rate Team Behavior
Compare your totals from the first scenario to your totals for the second scenario. You can see in the second scenario that the call-center team demonstrated the positive characteristics of good team members.

Activity — Examples of Great Teams
1. c
2. b
3. a
4. d
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