



*Leader guide*

**service**  
*xceptional*

**EXCEPTIONAL  
SERVICE  
LEADER GUIDE**

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# Welcome to “Exceptional Service”

Welcome to the Exceptional Service training program. As a group leader you will be helping yourself and the program participants learn to succeed at delivering exceptional customer service.

This program is built around the concept of all employees working together as a team to deliver exceptional service to customers. The structured approach increases sensitivity to customer and work-related issues by developing communication and quality service skills. Exceptional Service will have a powerful impact on the level of service your company provides if it has the support and commitment of you and your fellow workers. In turn, it offers skills, which will benefit you and your group for a lifetime.

The program is designed to achieve three main objectives:

Sharpen customer service skills by teaching techniques in customer care, quality communication, value-added service, and problem solving.

Generate a level of performance and commitment that develops an exceptional service culture through pride, professionalism, and team spirit.

Provide a means of teaching employees through easy-to-learn, easy-to remember steps to deal with customer situations and solve frustrating problems that come up in everyday encounters.

The material is well organized and user-friendly. What’s more, it is designed with flexibility in mind — you can conduct your exceptional service session in 2 hours or 4 hours, depending on your personnel skill levels and scheduling requirements. Whichever program length you choose, when you follow each step of this guide you will be able to lead your group through the material with confidence.

## Program Materials

### Your leader materials include:

- This Leader Guide with a step-by-step format designed to move you easily through the teaching process
- A participant book for preparation and review
- A video (DVD, VHS, CD, or VCD) illustrating exceptional service principles and techniques

In addition, you will use a supply of participant materials, as described later in this introduction.

## How to Use the Leader Guide

The leader guide is a complete reference for conducting an Exceptional Service program. A discussion script is provided for you to read or paraphrase as you conduct each segment of the program.

The program may be presented on one of two levels:

- Level 2 — approximate duration is two hours

This level uses all core material, plus additional group discussion and exercise activities to enhance your learners' grasp of the exceptional service concepts and skills. This level is recommended as a periodic refresher for all employees, or as an introductory course to customer service skills when time is limited.

To conduct a Level 2 course, follow the core Leader Guide material plus indented sections labeled "Level 2."

- Level 4 — approximate duration is four hours

This level provides the most complete treatment of the exceptional service philosophy and on-the-job service techniques. This level is recommended for all new-hires and for all employees who impact, directly or indirectly, the quality of your customer service.

To conduct a Level 4 course, follow the core Leader Guide material plus indented sections labeled "Level 4."

Your script is identified by passages of regular print, (contained in boxes) with directions to you in italics. The script contains brief lecture segments, but, by-and-large, consists of questions to generate discussion. The questions are based on workbook chapters, exercises, and video examples. Together with discussion, the system forms the framework of each segment of the program. Comments and answers are found within the parentheses directly below each discussion or exercise question in the script.

For your convenience, a transcript of each video segment is printed in the leader guide and located in the exact order of implementation. The scripts will enable you to review concepts without having to watch the video. You may wish to add notes in the margins about issues of importance or special application to your group. Your Leader Guide also contains role plays and exercises so that participants can personally practice Exceptional Service skills and concepts.

Visual reinforcement is an important element of any training effort. Use a chart, board, overhead, or chalkboard to illustrate points as directed by the leader script. Please note that the Leader Guide refers to a chart, but you can use whatever means you have available.

## **How to Use the Video**

The video demonstrates specific examples of the learning points of Exceptional Service. Each video segment matches with a workbook chapter, a set of exercise questions, and a discussion centered on the learning points. Presented in a positive, upbeat manner, the actors put themselves in the participants' shoes by illustrating common, day-to-day service situations. The actors portray model behavior in an effective visual medium to enhance the learning process.

### **The participant materials consist of:**

- A workbook consisting of text and exercises to solidify the concepts of Exceptional Service
- A certificate of accomplishment awarded to participants at the end of the training program
- A skill reminder card for handy reference outlining the basics of exceptional customer service

## **How to Use the Participant Workbook**

The participant workbook is designed to teach important, personal aspects of customer service, as well as explore in greater detail points not fully covered in the video or group discussions. It is an important part of the Exceptional Service system because it requires the participants to become actively involved in the training process.

As group leader, make sure you read the workbook and understand the concepts thoroughly. Combining what you read with your professional experience means you will use your ideas to enrich the program during group discussions.

Supply each member of the group with his or her own copy of the participant workbook and the accompanying support materials. A key element of the Exceptional Service concept is to stress the value each employee has in the operation of your organization. Each member will feel a sense of ownership as well as responsibility. These feelings and attitudes are critical in building commitment.

Each chapter of the workbook is read during the correlating discussion and video section of the training program. The exercises should be completed during each session in order to improve skill retention. Encourage participants to write notes, highlight areas where they have questions, or underline passages which have special meaning for them.

## Preparing for Your Program

To achieve the objectives of Exceptional Service on and off the job, training should be conducted in a systematic, organized way. At the same time, the program should be relaxed, informal, and fun for you and your group. If you are a supervisor or manager, you will find that your relationship with your employees will be improved by the frank, open approach of the Exceptional Service concept. They'll appreciate the interest and enthusiasm you bring to the discussions. By giving evidence of your personal interest in helping them improve themselves, you will show that you really care about them and about delivering exceptional customer service.

Below is a summary of steps to follow for planning the effective implementation of Exceptional Service.

1. Arrange groups to represent a cross-section of jobs, age, and level of experience. This promotes understanding of what other departments and personnel do, and it encourages the team-building process. Announce the program in written form for a specific time and place. Invite participants in writing. Email invitations and follow up in person or with a phone call to build enthusiasm for the scheduled training date. See page 15 for a sample invitation that may be reproduced or adapted for your use.
2. Select a meeting room where participants will be comfortable and not interrupted. Check the audio/visual equipment prior to the session to make sure it is in proper working order. Place the monitor so that all members of the group can easily see it. Place yourself within easy access to the video player in order to start and stop the video on cue.
3. Read the Leader Guide and participant workbook, including the exercises and role plays, prior to the session. Review the video as part of your preparation. The more familiar you are with the materials, the easier the implementation of the program will be for you and the group.
4. Make sure you have enough participant material for everyone in attendance. Each participant will receive a workbook, a certificate, and a skill reminder card. Have each certificate filled out with the participant's name, signed, and dated. The skill reminder cards should be distributed at the beginning of the Customer Care segment. It is a good idea to have pens or pencils on hand as well.

## **The Art of Good Leadership**

Make certain that your group sees you not as an expert in exceptional customer service, but as a facilitator or coach to help the entire group explore the program topics. Introduce yourself. Encourage everyone to speak candidly and freely. There are no right or wrong answers to the exercises or discussions. Accept all answers, and remember to call on a variety of participants to involve everyone in the learning process. Emphasize opening the lines of communication and developing an awareness and mastery of quality customer service skills.

Use the materials fully. Speak simply and precisely. You will be communicating feelings as well as information. Relax, and let your personality show. If you want to depart from the script, think about the questions you want to ask. Make a note in the margin of the appropriate area of the Leader Guide to prompt you.

When leading discussions, don't hide behind the Leader Guide. Make eye contact, smile, and scan the room while talking. Demonstrate good listening skills. When the discussion takes off, you'll need to follow along and guide the conversation in the right direction.

Please keep in mind that the learning process, particularly in a training program, is fragile. Don't allow one person to dominate the group. This kind of manipulation threatens others, especially subordinates or less experienced people. If you find one or two individuals trying to monopolize the discussions, communicate to the individual(s) that you would be happy to discuss the point or points in further detail at the end of the session or program. Then remember to do so. Call on other participants, and move the session along. If participants begin arguing, physically stand between the debaters so they cannot see one another. Then involve the entire group in the discussion by rephrasing the argument.

Finally, keep the sessions moving. Start on time and stop on time. Again, if participants seem to be spending too much time on certain topics, suggest further discussion at the end of the training. By maintaining a comfortable pace, you will keep participants alert and active. Good leadership requires you to stay on your toes and a step ahead of your group.



## The Art of Effective Questioning

**Exceptional Service** is not effectively presented by extensive lecture or directive. In Levels 2 and 4, there is ample time to ask questions of your group, and let the participants do the lecturing through their answers. By using this approach, you act as an interviewer who asks probing questions. The participants learn better when their emotions are involved, not just their intellect.

The best way to handle questions from the group is to answer with another question. Remember, the objective is to get group participants to interact and learn from each other through discussion. The best leaders avoid answering questions.

Here are five steps to follow for effective questioning:

1. Ask open-ended questions; that is, questions which cannot be answered by a simple yes or no. Open-ended questions start with who, what, where, why, how, and when. The questions in this leader guide are examples of open-ended questions
2. Ask questions to the group in general, a specific person in the group, or to a team of participants within the group.
3. Use certain key phrases, particularly during group questioning. For example, ask the group to:
  - Tell why something is important
  - Analyze a situation
  - Give his or her own story to illustrate a point
  - Offer suggestions to solve a problem
  - Explain how they feel

Redirect questions by asking other members of the group if they have suggestions or solutions.

4. If you receive inappropriate responses to questions, respond by using phrases such as: “That’s a good response. I hadn’t looked at it that way. Sally, how would you answer this question?” Keep the process positive.
5. When in doubt, if there is no response or the response is inappropriate **KEEP ASKING OPEN-ENDED QUESTIONS. Don’t answer the question yourself!**

## **The EXCEPTIONAL SERVICE System**

**Exceptional Service** teaches participants a cultural understanding of the concept of quality service. The team-building approach is based on skills that employees retain and can immediately put into use on the job. These skills and techniques are based on ten areas of quality service and cover personal and professional development.

In the first three segments, participants learn the philosophy of exceptional service. In the last seven segments, participants learn specific skills and techniques to deliver quality service.

Here is how the program is structured:

### **1. Introduction to the Program**

The participant introduction is an overview of how the program works, what is expected of the group, and what benefits it has for them. The group completes a pre-assessment exercise wherein they rate their level of understanding and awareness of service skills. Participants learn about the concept of total customer satisfaction and the role their team plays within this concept. The aspect of teamwork is introduced to the group through a team-building exercise.

### **2. Customer Expectations**

Participants explore what customers expect from the company and its employees. The elements of a positive attitude, sincere motivation, courtesy, and respect are discussed. The group is introduced to how performance impacts the service experience. The group adopts the motto: Treat Others As You Would Like To Be Treated.

### **3. Everyone's Important**

The participants discuss and learn why everyone is important to the operation of the company. The importance of pride and professionalism on the job are highlighted. To conclude the segment, participants learn that co-workers are also customers and that teamwork is essential in delivering quality service.

### **4. Customer Care**

This segment sets up the skill-building aspect of Exceptional Service. Skill reminder cards are distributed to the participants, which outline the four general areas of exceptional customer service. "Customer Care" deals specifically with techniques based on the exceptional service philosophy covered in the first three segments of the program. Specific skills include establishing trust, empathizing, listening, questioning, understanding, and responding with effective solutions. Role-play is conducted to practice questioning skills.

## **5. Communicating Quality**

Image, and how it impacts communication, is discussed in detail. Participants learn how verbal and non-verbal aspects of quality communication affect their image. First impressions are highlighted to illustrate the importance of attitude. The group practices, through role-play, body language techniques for personal improvement.

## **6. Value-Added Service**

Participants learn how to take exceptional service a step further in order to offer memorable service to their customers. The group explores specific techniques as well as how important follow-through is to successfully deliver exceptional service.

## **7. Problem Solving**

Participants discover why customers complain and learn that complaints are really a request for help. Specific skills for dealing with customer dissatisfaction are covered, as well as tactics to avoid.

## **8. Service Recovery**

Here participants learn the critical skills of regaining customer goodwill after a service problem has occurred — particularly when the problem stems from the company's own service mistake. At this point in the program, you have the opportunity to cover policies and procedures that participants should follow in a variety of service recovery situations.

## **9. Speed**

This section outlines the importance of speed to the success of exceptional service and especially service recovery. Discuss strategies to utilize urgency when working with customers or solving customer problems. How can participants get things done five times faster than anyone else in their industry?

## **10. And In Conclusion**

The final segment of Exceptional Service consists of wrap-up and conclusion of the program. Exercises, including a post-assessment, are completed as a means for participants to chart their progress and plan improvement. Certificates of accomplishment are awarded to all members of the group in appreciation for their contribution.

## Audience Size

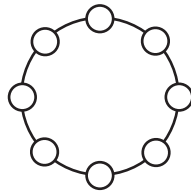
Consider these guidelines when deciding on the number of sessions to hold:

- 5-10 participants - ideal for a new leader
- 8-15 participants - the optimum size
- 16-30 participants - fine, but requires an experienced leader

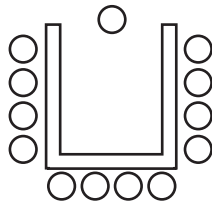
## Seating Suggestions

The physical layout of your training room should reinforce the team aspect of the session. Group participants in order to facilitate easy discussion and interaction.

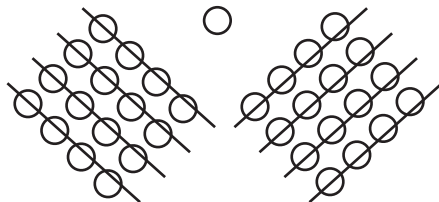
Small audience of 3 - 7 participants



Medium audience of 8 -15 participants



Large audience of 16 - 30 participants



## **Gathering Your Training Materials**

- An invitation for each team member invited to the program
- An “Exceptional Service” Leader Guide
- An “Exceptional Service” DVD, VHS tape, or CD
- An “Exceptional Service” Workbook for each participant
- A DVD, VHS, or CD player and monitor
- Skill Reminder Cards for all members of the group
- Customer Service Performance Standards for all members of the group
- An “Exceptional Service Certificate of Accomplishment filled out and signed for each member of the group
- A presentation board, chart, overhead, or chalkboard with markers or chalk and eraser
- Pencils or pens and writing paper for participant use
- Name tags, seating chart, or table markers if necessary

### Sample Invitation for “Exceptional Service”

Date:

To:

From:

Subj: **Exceptional Service**

It is my pleasure to invite you to join us for an outstanding learning opportunity covering “**Exceptional Service**”. This workshop is designed to benefit you, our customers and our company, and we should have some fun with it, too.

I’ve familiarized myself with **Exceptional Service** and felt immediately that it is a program that all of us would find helpful and enjoyable. All of us need to occasionally revisit our skills at delivering quality customer service and keep refreshing ourselves on how to use them effectively.

The basic concepts of **Exceptional Service** that we’ll be discussing during the session will help us in our daily contact with customers, fellow employees, family, and friends. There has never been a time when positive exceptional service, speed, and effective communication has been in greater demand.

We’ll hold our **Exceptional Service** group meeting at \_\_\_\_\_  
(place) on \_\_\_\_\_ (day), \_\_\_\_\_ (date), at \_\_\_\_\_ (time).  
Please confirm your availability for this time as soon as possible.

Sincerely,

(Your signature)

# Introduction to Exceptional Service

**Level 2: 10 Minutes** Follow core Leader Guide which is flush to the left column.

Follow core Leader Guide material plus indented sections labeled “Level 2.”

**Level 4: 20 Minutes** Follow core Leader Guide material plus indented sections labeled “Level 4.”

*Note to Leader: Distribute workbooks to participants as they enter the classroom. Follow with a personal greeting, and introductions as appropriate.*

Welcome to **Exceptional Service**. We’re here today because, as members of the (company name) team, we are responsible for providing exceptional customer service. Our company believes in helping us grow both personally and professionally. As a result, this training program was developed to help us improve the quality of service we deliver to our customers.

Why is exceptional service so important? Because it’s good for business. A company’s reputation in any industry is built on the quality of service that is offered. We want our reputation to be of an organization that provides the best possible customer service in our entire industry. It’s also good for each of us as we strive to be the best we can be. The skills you will learn here today should help each of us strive to be the best that we can be no matter where we work throughout our lives.

For the rest of our session, we will discuss the many different dimensions of exceptional customer service. You each have a workbook, which you can use both during today’s session and later, whenever you choose to further develop your own service skills. We’ll also be watching several video segments which depict some excellent examples of exceptional customer service.

**Level 4*****Optional Team Approach Introduction:***

To allow for more personalized introductions and as a preview to teamwork, divide the group into pairs. Instruct participants to conduct a short interview with their partner, during which they learn their partner's name, length of time with the company, and one example of exceptional customer service he or she has seen or observed. Then have each participant introduce his or her partner to the group by sharing what was learned in the interview. Allow about 15 minutes for this activity.

To begin Exceptional Service, please fill out the Pre-Assessment Exercise on page 5 of your workbook.

(Allow approximately 3 minutes for participants to complete the exercise.)

Is everyone finished? Good.

**Level 2,4**

The exercise asked you to "check" three statements which you think are the most important to you. Please pair up with a neighbor, and discuss one of your choices. Discuss why you feel it is most important to you.

(Allow 5 minutes for participant pairs to exchange information.)



## Segment 1: Delivering Exceptional Service

Level 2: 10 Minutes

Level 4: 15 Minutes

In order to deliver exceptional service, we need to focus on the customer's point of view. After all, what the customer thinks of the service we provide is what matters.

**Level 2, 4**

What's your number one priority when you're a customer?

(Pause for responses. Possible responses include:

- getting a good product
- timeliness
- friendly staff)

When customers buy something, they always have more in mind than just ending up with a product or a service. First of all, they have a need which the product or service is intended to meet — they're buying a coat to keep warm or getting their car fixed so they can get to work in the morning. In addition, they want to feel good about purchasing the product or service.

When both of these criteria are met, customers experience total satisfaction. Total customer satisfaction is the result of a quality product as well as an exceptional service experience.

Like any other business, we want satisfied customers because their satisfaction relates directly to our reputation. To help us deliver total customer satisfaction, we're meeting today to discuss exactly how to go about it.

**Level 2, 4**

Each of us has an opinion of what makes up good service or poor service. Based on your experiences as a customer, please give me an example of poor service you received. How did it make you feel?

**Level 2, 4**

(Call on two or three participants to share their experiences as a customer. Responses generally include statements of:

- disappointment
- anger
- hurt feelings
- frustration)

Our goal is to look at what we're doing now, and find better ways, together, to deliver exceptional service to our customers.

The workbook is yours to keep. Feel free to make notes from the video and discussions. Write down any questions that you may have. Underline or highlight areas of special meaning to you. Take a moment now to write your name on the first page of the workbook.

**Level 2, 4**

Please read "Delivering Exceptional Service" on page 7.

(Pause until participants finish.)

**Level 4**

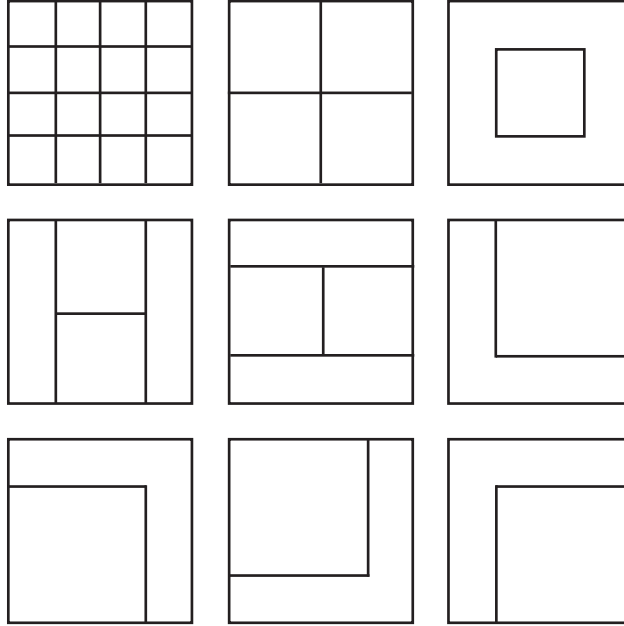
On page 8 of your workbooks, you'll find a drawing of 16 squares. There are actually 30 squares in this drawing. Notice that the 16 squares form one large square. That makes 17. Now, let's take a minute to see how many of the 30 squares you can find.

(Allow 1 minute for participants to count squares.)

## Level 4

Okay, how many of you were able to find all 30 squares?

(Pause for a show of hands. Most likely, few participants have found all 30 squares. Sample answer below.)



Now, please form teams of 3 or 4, and together see if you can account for all 30 squares.

(Allow approximately 3 minutes for participants to do so. Participants will find that through teamwork they are able to find squares more quickly and efficiently.)

That exercise just demonstrated when we work together as a team, we can accomplish more and do it more easily and efficiently. That's what Exceptional Service is all about.

Now, let's take a look at our first video section.

(Please turn on the video and view segment 1: Delivering Exceptional Customer Service.)

**Video Transcript:**

**NARRATOR:** Welcome to “Exceptional Service.” Today we’re going to explore exceptional service and attempt to discover ways that each of you can create exceptional customer satisfaction. Hi, I’m Bill and I’ll be your tour guide.

You see, I’m an expert at service. That’s because I’m your customer, and I know that good service is the main reason why I visit the organizations I do and the reason why I keep going back to those same places over and over again.

No matter what industry you’re in, you should always be in the business of providing exceptional service to your customers. What’s more, you’re a member of a team that’s dedicated to superior customer service. Maybe you work in the retail industry, or for a government agency, or you are employed by a financial institution or health-care organization. Perhaps you serve customers face-to-face, or by phone at a call center.

Whatever the product or service you provide... however you come in contact with your customers ...the same principles of exceptional service apply. Your number one job is to provide exceptional service by welcoming every customer, helping them, and exceeding all of their expectations. It can be challenging, but that’s why it’s so important that you work together as a team to provide the best service possible.

You may be familiar with some of the themes we will discuss and others may be new. In the end we hope to provide you with the knowledge and skills you need to exceed all of your customers’ expectations... and encourage those customers to return soon and often.

Let us begin at the beginning. Think for a moment, how do you like to be treated when you’re the customer?

(Please stop the video.)

## Segment 2: Customer Expectations

Level 2: 20 Minutes

Level 4: 30 Minutes

The video asked us to think about how we like to be treated when we are a customer. What attitudes, motives, or feelings do you look for from the sales — or serviceperson who's serving you? Let's list them on the chart.

(Accept several participants' answers. List responses on the chart. Responses should include:

- courtesy and respect
- hospitality
- friendliness
- be acknowledged or recognized
- show sincerity
- interested in me or my needs
- hassle-free service
- prompt and efficient service)

The way you like to be treated as a customer or as a guest is an expectation. We expect others to show interest and treat us fairly.

Level 2, 4

For example, let's say you're in a hurry and need to get through line at the bank during your lunch hour. You need prompt and efficient service from the cashier. But, at the same time, you expect courteous and respectful service.

Now let's look at it from our customers' point of view. What do you think our customers want from us?

(Pause for responses.)

Needs may be different, but everyone expects to be treated in a friendly, positive way.

So, the first rule of meeting customer expectations and needs is the Golden Rule: Treat Others As You Would Like To Be Treated.

Let's go back to the video.

(Please turn on the video and view segment 2: Customer Expectations.)

### Video Transcript:

**NARRATOR:** As you've discovered, customers expect service that meets and exceeds their needs, and their needs may be varied.

**CUSTOMER 1:** I expect the government employees to be professional, fast, and friendly.

**CUSTOMER 2:** I expect my order to be taken with courtesy and efficiency.

**BANK CUSTOMER:** When I stop into the bank on my lunch hour, I only have a limited amount of time... I can't wait in an endless line for a single teller to help me. And I need answers fast. If I apply for a loan I can't wait around forever for an answer. I have decisions to make and a quick answer from the bank can make all the difference.

**TELLER:** When a customer is in a hurry I need assistance from the rest of the staff to assist that customer quickly.

**NARRATOR:** Customers expect to be served with a positive attitude and sincere motivation. They expect employees to be courteous, to treat them with respect, and to work fast. Customers recognize the difference between just doing what is necessary and going the extra mile. Customers call that difference "quality."

How do you think you and your co-workers measure up with your customers?

(Please stop the video.)

### Level 4

Based on the video examples, let's compare their customer expectations with those we listed on the chart.

(Call on a variety of participants. Examples from the video included:

- courtesy and efficiency
- clean and ready rooms
- professionalism
- friendliness
- help)

Let's consider some of the points made by the video. We start meeting the needs of our customers by having a positive can-do attitude. What are some benefits of a positive attitude?

(Answers should include:

- feels good
- work is easier and more pleasant
- more confidence
- opens lines of communication)