**Instructor Guide**

**Safety**

Table of Contents

[Overview and Goals 3](#_Toc363902337)

[Preparation – Facilitation Guidelines 3](#_Toc363902338)

[Materials 3](#_Toc363902339)

[Schedule 4](#_Toc363902340)

[Boot Camp Activities 8](#_Toc363902341)

[Activity Worksheet #1 8](#_Toc363902342)

Overview and Goals

Good customer relations are key to a utility company's success. To ensue and increase customer satisfaction, it is important that everyone follows best practices to ensure professional communication skills, appearance, and to effective resolve conflicts.

In this unit of work the instructor will:

* Highlight the concepts introduced in the online course.

Upon completion of this unit of work, participants will be able to:

* Explain the importance of good customer service
* List characteristics of a professional appearance
* Identify importance aspects of the service order
* Describe how to properly handle appointments
* Identify good and bad communication styles
* Explain the best way to deal with unhappy customers
* Describe steps to ensure customer satisfaction

**Note:**

*In addition to the topics covered in the online course incorporate best practices associated through local practices for detailed illustration, as appropriate.*

Preparation – Facilitation Guidelines

Ensure the participants have completed, UGE-2000 Customer Contact, including the pre-test and the 15 question course assessment the following online course.

Conduct this training in a classroom setting encouraging discussion. Emphasize the importance of participation.

Use a flipchart to capture key lessons learned from the group discussions, or to identify questions that will be answered in upcoming units of work or that require further research and discussion.

Materials

Provide the each participant a copy of the Activity Worksheet.

Schedule

| **Time** | **Topics for Discussion, Demonstrations, and Activities** |
| --- | --- |
| **60 minutes** | **Introduction**   * Explain why this course is important. * Point out that   + The image of the public utilities is often measured, not on their abilities to handle problems, but just how.   + The front-line workers (those handling responses) and the job site workers are the face of the organization.   + Each person must be well-versed and follow the company policies and practices to ensure the best possible customer service is consistently provided on every job by everyone. * Explain that good customer service is a balancing act of getting the job done correctly, safely, and maintaining strong customer relations. * Encourage participants to consider that the public image of any company starts with daily interactions and one-on-one customer interactions and that is how a person perceives the organization as a whole. |
| **60 minutes** | **Topic: Customer Relations**   * Clarify the difference between Core Service and Customer Service   + Core: product is reliable   + Customer: Interaction * Emphasize the importance of positive customer interaction * Point out how customers evaluate customer service   + Words   + Actions   + Demeanor * Discuss problems which arise through poor customer service * Outline the benefits of good customer service * Present (or solicit from the participants ) a relevant example of a service-related customer service/response that illustrates:   + A positive customer relations image.   + A negative customer relations image   + Examples:  1. Personal examples of a service call gone awry. 2. Large scale disaster response: Hurricanes, storms 3. Accidents because workers were not cognizant of property and surroundings 4. Major accidents, e.g, Gulf BP Oil spill  * Ask participants for examples of poor customer sevice they’ve encountered. * Follow up with discussion about what could have been said of done to provide good customer service in these situations. |
| **30 minutes** | **Topic: Personal and Professional Behaviors/Handling Appointments**  Review the importance of a   * + Professional appearance   + Appearance of vehicles and tools * Clean * Organized/neat * Be Prepared * Ensure the service order is complete * Understand computer aided dispatch procedures * Call ahead to advise customer of arrival * Appointment procedures * Ensure all appointments are kept * If it is necessary to reschedule or cancel an appoint, contact the customer as soon as possible. * Call ahead to advise customer of arrival   + Courteous and safe driving     - Do not block the driveway     - Park in a legal space   + Friendly and respectful treatment of customers and customer property * **Residential**   + Approaching the customer’s home   + Don’t walk on a customer’s lawn   + Do not smoke   + Do not litter   + Care and respect of property when entering a customer’s home: clean boots or wear shoe coverings, do not track dirt   + Ensure all animals are confined; do not ignore any escaped animals advise the customer immediately * **Commercial**   + Discuss local company practices for onsite commercial property |
| **10 minutes** | **Topic: Entrance and Exit-Handling a Service Call**  Explain that after preparing and arriving for an appointment to handle each service call in the following manner –from entrance to exit. For each of these topics present “real-world” examples of situations. Also encourage the participants to share relevant experiences.   * The entrance, upon arrival   + Show ID   + Use the customer’s name   + Ask permission to enter   + Remove shoes or put on shoot coverings   + Smile * Follow company policy to reschedule an appointment if the customer is not at home or there is no adult present. * Reinforce that all workers must ensure that the work area is thoroughly clean when the job is completed. * Make sure the customer inspects the completed work area and is satisfied |
| **20 minutes** | **Topic: Responding to unsafe circumstances**  Explain how to handle customers and or situations that are not appropriate for a service call.  Reinforce that all workers must follow company guidelines.  Point out   * Do not enter a customer’s home if the customer appears to be unstable, for example under the influence of drugs or alcohol. * Follow company policies if you suspect illegal activity such as drugs, stolen goods, or firearms.   + Do not touch anything   + Do not draw attention to your suspicions   + Report to appropriate agencies after exiting the property   + If confronted, call 911 immediately * Follow company policies if you arrive at the appointment and suspect the property has been vandalized or broken in to. |
| **60 minutes**  (15 minutes)  (15 minutes)  (30 minutes) | **Topic: Customer Interaction**   * Discuss how good communication and professional customer service practices greatly increase customer satisfaction. * Explain that effective communication includes the following:   + Good listening skills     - Be sure you let the customer explain his or her problem. The information may provide further insight to the problem and/or details of the work order.   + Asking questions     - This ensures the customer that you are listening and interested.   + Answering questions     - This shows respect to a customer; acknowledging the value and importance of their questions.   + Explaining your actions     - This eliminates potential concerns that a customer might have about the service work   + Avoiding jargon     - Do not use industry terms or acronyms that the customer does not recognize.   + Avoiding criticism     - Do not discuss other work, equipment, or personnel. * Follow company guidelines to overcome language barriers if there is no one at the site who can translate between languages, such as help from another employee. * Explain that when handling customer requests to be positive and friendly and that to the customer it is very important.   + Respond if you are able to handle the request and if so how.     - If you are unable to comply be empathetic and explain why you cannot     - If you are not sure you can comply, explain you will check with the company for how you can handle the situation and report your findings to the customer. * Emphasize the importance of ethical behavior.   + Always follow company policies and procedures and be sure to:     - Disclose and charges or costs before starting the service work     - Act honestly     - Do the best work you can     - Do not accept tips or gifts     - Do not accept side jobs     - Do not use the customer’s bathroom     - Do not use the customer’s phone unless absolutely necessary   + If an error is made on the job, correct the mistake following company policies and ensure that you:     - Express concern     - Apologize     - Specifically define the remedy   Present “real-world” examples of situations for discussion. Also encourage the participants to share relevant experiences.   * Discuss how to handle upset customers, do not argue. Be sure to follow company policies and practices which will include, but are not limited to the following: * Explain your actions to clear up any misunderstandings * Take the time to discuss the customer’s objection in order to ensure him or her that you understand the concerns and reassure that your intentions are to provide the best possible solution. * Do not argue against verbal attacks. Acknowledge that the customer is upset and that you are there to help solve the problem * Describe personal examples and ask questions about how tohandle such situations. |
|  | **Just for fun!**  If there is time…..  Talk about how we always hear about customer service problems, but sometimes there are some great customer service stories and that there are some very creative ways to solve problems.  <http://mentalfloss.com/article/30198/11-best-customer-service-stories-ever>  This relates to the first article: <http://shankman.com/the-best-customer-service-story-ever-told-starring-mortons-steakhouse/> |
| 30 minutes for preparation.  The number of teams and presentations will determine total time allocated. | Instruct participants to complete **Activity Worksheet #1**   * Team discussion (30 minutes) * Presentation (15 minutes) * Group discussion/feedback (15)   **Instructor Note:**  *As an instructor, there may be “real-world” situations which can be presented for workshop discussion. Please use those when appropriate. The scenarios presented below are examples of suggested topics that can be further enhanced to meet the needs of your local area and communities.* |

Boot Camp Activities

|  |  |
| --- | --- |
| Activity Worksheet #1 | |
| * Working with a partner or partners, review the scenario which you are assigned. * Determine the proper practices and actions to take. Be thorough in your discussion and discuss all the answers to ensure you are considering the customers’ positions as well as those appropriate to the utility. Be sure to consider:   + - Your appearance     - Your personal behavior     - Your initial approach to the property and with the customer     - Your safety, the respect of the customer’s property     - Communicating with the customer/interaction     - Maintaining ethical behavior     - Handling customer conflicts     - Resolving the problem with satisfaction * The scenarios will be presented to the group for further discussion. Keep track of key points on this worksheet as well as the classroom flip chart (as needed.) | |
| What actions would you take? Why |  |
|  |
|  |
|  |
|  |
|  |
| What are you concerns as the utility working handling this situation (if question is appropriate)? Why? |  |
|  |
|  |
|  |
|  |
|  |
|  |
| What would be your concerns as a customer (if question is appropriate)? Why? |  |
|  |
|  |
|  |
|  |
|  |
|  |
| Lessons learned-general discussion questions or notes |  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

1. A customer has a service call to regulate the flame on his or her gas cook top. You arrive on the job and find that it is not a problem with the gas flow to the cooktop, but the actual appliance. The customer does not believe you and insists that:

* You do not know how to do your job
* You call the company and connect him/her to your supervisor

What do you do?

1. An appointment is set for you to work on an outside meter. You arrive at the appointment on time and the homeowner shows you the meter location. While you are working the home owner leaves without telling you. You run into a problem and need authorization from the customer to make the repair due to an additional cost for a part.

What do you do?

1. Have you ever had a day like this?

You wake up, your son is sick; your wife has to call off work to stay home with him. Then you get in your truck to go to work and see the gas gauge is low, forcing you to stop for gas, which makes you late for work. After getting your work orders you make calls to your first customer only to get his/her answering machine. Rather than run later, you call the second customer and confirm that you can go to the appointment. You arrive and complete the work, but stumble in a muddy area so your uniform is now dirty. Your supervisor calls and says customer #1 called in to complain you did not make the appointment. The day is not going well and you are not in a very good mood.

* What did you do wrong on the job? Why?
* What do you need to do? Why?
* Are your clothing and/or demeanor going to make a difference to customer #1 or your supervisor? Why?

1. You arrive at an appointment and the elderly home owner does not understand why you are there. The customer also does not speak English as a first language. You know you must keep the appointment because it was an emergency call from a neighbor who reported an odd smell in the customer’s yard.

What do you do?

1. You arrive at an appointment and the door is wide open. You yell out that you are there and the owner just tells you to come in to the house. You see a gun on the table by the front door.

What do you do?