



# ziggets

benchmarks for business success

**customer service**

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benchmarks for business success

## customer service

# WELCOME

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## Thank you for investing in the Training Ziggets program!

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**Congratulations!** You are about to teach a course that will change the way sales professionals sell! The principles in this course have changed hundreds of thousands of lives for the better. Both the company and the individual benefit from employee participation in this easy-to-implement program. We want to give you an understanding of the course format to help make this a successful learning experience for you and the participants.

## Format Explanation

The Instructor's Guide includes a worksheet you will copy for each participant as well as all the necessary instructions you need to teach the class.

These are the components for each module:

**Timing Guidelines:** Allows you to see approximately how long each component will take, giving you the flexibility to schedule your training when most convenient for you.

**Say:** This information is provided in a narrative format for you to adapt to your own style of teaching; it is NOT a script to be read verbatim. Rather it is a suggestion of how to introduce a lesson or activity.

**Activity:** The activities in each lesson have been carefully selected to provide elements of self-discovery and opportunities to practice building skills in the safe environment of the classroom.

**Do:** Step-by-step procedures for each worksheet.

**Show Video:** Each lesson has the teaching points given on a 5-6 minute video. This is an important part of each lesson.

**Ziggets:** These are the key points - the principal elements - each participant should leave with, from a particular lesson. A quick review of these would serve as a great way to close the training session.

# ABC'S OF ADULT LEARNING

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Adults need a time to “shift gears” and get “warmed up” when attending training. Your Instructor’s Guide is a resource for ways to energize your sessions. The opening activity should be relevant to the content, not just an icebreaker. A professional training effort will always give attention to the opening activity because it can:

- Put people at ease and energize them to the task of learning
- Demonstrate your philosophy of learning
- Indicate that participants are responsible for learning and that you are their facilitator
- Communicate the kind of trainer you are
- Serve as a bridge to later activities
- Set climate, tone and pace for the program

**Big Picture (overview)** is needed for all adult learners, but there are particular learners who will stay in a state of confusion until they can see the “big picture.” This part should include:

- A general comparison (early in the course) of the learning goals to the salesperson’s own life, job environment or career development
- An explanation that training is related to solving specific problems sales people experience
- Competencies or skills that will be practiced and learned
- Assurance that they will not be judged but rather assessed as they actively participate in the learning process
- An opportunity to monitor themselves and each other

**Control** of one’s own learning gives adults more of a sense of confidence. It also reduces resistance. Set up your training environment to be casual, but structured. Adults need to:

- Learn at their own speed
- Talk aloud and share their thinking processes and ideas
- Monitor themselves and discover their own answers, at times
- Receive feedback to help “work it out” for themselves versus right or wrong answers
- Explore the relevance of the material to their own worlds, on and off the job
- Understand how they are doing from time to time

What you “expect” from your participants you will often get. Many studies have shown that the teacher’s expectations, perception, and opinion of the student and his/her capabilities DO affect the student’s results.

# A DOZEN TIPS FOR A SUCCESSFUL CLASS

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**Tip 1:** When asking for questions or comments at the end of a segment, ask, “What questions or comments do you have?” instead of “Are there any questions?” The former phrase indicates you assume people will have questions, giving unspoken encouragement and permission to participate.

**Tip 2:** Review the module and prepare your supplemental material, personal anecdotes and overheads in advance.

**Tip 3:** When asking for participation in a large group, “introverts” need 2-3 minutes to think before they are ready to answer. You may want to say something like, “Think about objections (or whatever the topic you are discussing). What are they and how are they useful?” (Pause for 1-2 minutes before obtaining answers.) Then say, “Who is ready to answer?” Questions that ask how, what, etc., are often less threatening than “why” questions.

**Tip 4:** Reward participation, not just right answers. Small prizes such as funny notepads or candy can be included for certain activities that encourage competition.

**Tip 5:** If you get resistance in any exercise because the participants feel awkward, tell them that a training environment is like a lab experience, unfamiliar at first. However, as they continue to practice, the skills become more “natural.” The classroom is a safer place to learn than on the job.

**Tip 6:** Another way to encourage shy people to participate is to use the following process for your debrief: Before you ask people to answer questions, tell them to THINK, PAIR AND SHARE. That is, ask the questions you want the participants to answer. Give them about two minutes to think. Ask them to pick a partner and discuss their findings for this time period. Then bring them into the large group to share further, if you choose.

**Tip 7:** Ten minutes is a long time for a lecture. Keep your talks as short as possible for adult learners and break up the teaching time with activities.

**Tip 8:** You don’t have to know all the answers. You can throw the question back to the participants by saying, “Who can answer that question?”, “What do YOU think about....?”, “What other answers might there be?”, or answer with silence.

**Tip 9:** Use creative ways to partner people. For example, tell participants to “make eye contact with someone NOT next to you and that person is your next partner.”

**Tip 10:** Each group needs a leader to keep things moving and to act as “scribe” or spokesperson. Choose them in unique ways, such as asking, “Who in your group went to bed latest last night?”

**Tip 11:** When listing information on a flip chart (collected from the participants), use two colors alternately for ease of reading.

**Tip 12:** Research has shown that playing classical music at 40-60 beats per minute in the background during table discussions or individual exercises increases the relaxation and alertness of the participants.



## CUSTOMER SERVICE IS AN ATTITUDE!

**Note:** The worksheet for this lesson is two pages.

**Do:** 5 minutes

1. Ask the following questions to generate discussion about how hard it is sometimes to service our customers:

- What makes you angry when dealing with a customer?
- When is it most difficult for you to be nice to the customer?
- What are some things customers do that make it difficult to do business with them?

**Show Video:** 6 minutes

**Do:** 10 minutes

2. Discuss the questions on the worksheet.

**Activity:** 10 minutes

3. Read the instructions for the activity. You may choose to let the participants work in pairs or groups of 3 on this. (To stimulate creativity, it would be nice to have colored markers available.)

4. Have volunteers share their answers.

5. Review the ziggets of this lesson.

**Ziggets:**

- Good customer service starts with a positive attitude toward the customer
- Good customer service means exceeding their expectations and making it obvious





## CUSTOMER SERVICE IS AN ATTITUDE!

### Video Notes:

- Customer Service requires knowledge, skill and attitude
- It is the customer who signs your paycheck
- My job is to serve the customer
- Make your good customer service obvious to the customer

### Questions for Discussion:

1. Why is attitude so important to good customer service?

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2. What are some benefits of serving our customers beyond their expectations?

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3. What are some things we do for customers that would exceed their expectations?

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4. How can we make sure we are making our good service obvious to the customer?

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**continued**

### **Activity:**

Since good customer service is an attitude, we need to make sure our attitude remains positive toward the customer. That means we need to focus on the positives, not the negatives of serving our customers. Individually, describe what you like about working for the customer. You may do this in paragraph form, with pictures, or any other creative way. Be prepared to share with the other participants.

## MEETING AND BEATING CUSTOMER EXPECTATIONS

**Note:** The worksheet for this lesson is two pages.

**Do:** 5 minutes

1. Discuss what level of service is expected of participants when:
  - They plan to eat at (name of fast food place nearby)
  - They plan to eat at (fancy, expensive restaurant in town)
  - They go to their favorite grocery store
  - They get their driver's license renewed

**Say:**

Today we are going to look at what customers expect of us and how we can live up to their expectations.

**Show Video:** 8 minutes

**Do:** 20 minutes

2. Have participants individually rate themselves and the business on the factors.
3. Discuss the questions on the worksheet.
4. Review the ziggets of this lesson.

**Ziggets:**

- Every customer has certain expectations of your business
- We can consciously work at meeting and beating those expectations
- It is important to get feedback from customers to know what they are expecting



# CUSTOMER SERVICE: LESSON #2 - WORKSHEET

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## MEETING AND BEATING CUSTOMER EXPECTATIONS

### Video Notes:

- R\_\_\_\_\_ - no unkept promises
- R\_\_\_\_\_ - make it up to me
- R\_\_\_\_\_ - prompt attention
- A\_\_\_\_\_ - knowledgeable and skillful employees
- T\_\_\_\_\_ - appearance of physical facilities, equipment and people
- E\_\_\_\_\_ - individualized service

On a scale of 1 to 5, with 1 being terrible and 5 being terrific, rate yourself and your business, in general, in each of the factors discussed on the video.

<b><u>Factor</u></b>	<b><u>Personal</u></b>	<b><u>Business</u></b>
Reliability	_____	_____
Recovery	_____	_____
Responsiveness	_____	_____
Assurance	_____	_____
Tangibles	_____	_____
Empathy	_____	_____

**continued**

## CUSTOMER SERVICE: LESSON #2 - WORKSHEET (CONT.)

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### Questions for Discussion:

1. Which factor did you rate the lowest for the business? What are some action steps that could be taken to get a better rating?
2. What promises (either implied or stated) do we make to our customers?
3. How good are we at keeping those promises?
4. How would our customers rate each of the factors using the same 1 to 5 scale?
5. What action steps do we need to take to get a better rating?

## BE BETTER, FASTER OR DIFFERENT FROM YOUR COMPETITION

**Note:** The worksheet for this lesson is two pages.

**Do:** 5 minutes

1. Have the participants list your competition. How are you different from your competitors?

**Show Video:** 4 minutes

**Do:** 10 minutes

2. Discuss the questions on the worksheet.

**Activity:** 10 minutes

3. If you can, post three different flip chart pages around the room, each with a different question on top. How can we be better than our competition? How can we be faster than our competition? How can we be different from our competition? Allow the group to move around for 5 minutes, writing their ideas on the paper. By reading other people's ideas, it may stimulate a new thought for someone else.

4. Or, assign a different topic to three different groups and allow them to brainstorm ideas for 5 minutes. Then have each group report their answers.

5. Or, discuss as a large group. Be sure that you are getting specific ideas. Even if some of them may be unusable, they may lead to a great idea!

6. Review the Ziggets of this lesson.

### **Ziggets:**

- You must distinguish yourself from your competition
- You can do this by being better, faster, or different





## BE BETTER, FASTER OR DIFFERENT FROM YOUR COMPETITION

### Video Notes:

- Be better, faster or different from your competition
- Ask your customers what they want and then determine how to do it

### Questions for Discussion:

1. What are we currently doing that is better, faster or different from our competitors?

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2. If you were to ask our customers today what they wanted from our business, what do you think they would say?

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3. Are we fulfilling their requests?

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4. List ways we can realistically communicate with our customers and ask them what they want. (For example, comment cards at point of sale.)

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**continued**

## CUSTOMER SERVICE: LESSON #3 - WORKSHEET (CONT.)

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### **Activity:**

Using the space below, brainstorm a list of ways that we could be better, faster or different from our competition.

## CREATING CUSTOMER LOYALTY

**Note:** The worksheet for this lesson is two pages.

**Do:** 5 minutes

1. Ask some of the participants to share where they really enjoy doing business - a place for which they consider themselves a fan.

**Say:**

Today we are going to discuss how we can get our customers to feel about us the way you feel about the businesses you just described. How can we create customer loyalty?

**Show Video:** 6 minutes

**Do:** 10 minutes

2. Discuss the questions found on the worksheet.

**Activity:** 10 minutes

3. Briefly discuss the processes a customer goes through to do business with you. Brainstorm any ways that could be streamlined or any ways to incorporate more "fun" into the process.

4. Divide the group into two smaller work teams. Assign one team the negative role play and the other team the positive role play. Give each team 3-5 minutes to prepare and then no more than 2 minutes to perform the role play.

5. Discuss any differences seen in the two role plays and any lessons learned from the role plays.

6. Review the ziggets of this lesson.

**Ziggets:**

- To create customer advocates, you must go beyond satisfaction
- Developing customer advocates is everyone's concern - not just the owner's or manager's



## CREATING CUSTOMER LOYALTY

### Video Notes:

- Two-way communication is important
- Give individualized attention to each customer
- Make the process of doing business easy and fun
- Reward customers for doing business with you
- Go above and beyond the customer's expectations

### Questions for Discussion:

1. How can we better communicate with our customers?

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2. How are we currently personalizing the service we give to customers?

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3. How can we do better?

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**continued**

## CUSTOMER SERVICE: LESSON #4 - WORKSHEET (CONT.)

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4. What are some specific ways we reward our customers?

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5. Who are some of our current customer advocates?

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### **Activity:**

Role play a “typical” customer interaction.

In the negative role play, make every process go wrong. Exaggerate any tedious processes currently in place.

In the positive role play, show each process running smoothly. Think of some ways to add fun to the process of doing business with you and incorporate those into the role play.

## HANDLING CUSTOMER COMPLAINTS

**Do:** 5 minutes

1. Ask volunteers to describe a recent bad customer service situation that they personally experienced. (You may want to have an example ready to begin the discussion.) Ask them how that experience made them feel.

**Show Video:** 6 minutes

**Do:** 20 minutes

2. Discuss the questions on the worksheet. (10 minutes)

3. If the group is larger than 6 participants, divide the group into smaller work teams of 3-4 people each.

4. Ask each group to identify information that should appear on a CPR form that can be used on the job. (4 minutes)

(Example of information you may want to include: customer's name, address, day phone and evening phone, e-mail address, name of employee receiving the complaint, solution to the problem and what steps must be taken, when the problem was or will be resolved, what follow-up occurred.)

5. Then have each group create a CPR form. (6 minutes)

6. Make the commitment in front of the group to take the information and create a form for your department or business and distribute to all employees.

7. Review the ziggets of this lesson.

### **Ziggets:**

- Adopt an attitude of gratitude for your customers who complain
- Be alert to complaints - ask and then listen
- Document EVERY complaint





## HANDLING CUSTOMER COMPLAINTS

### Video Notes:

- Adopt an attitude of gratitude for your customers who complain
- Be alert to complaints - ask and then listen
- Document EVERY complaint

### Questions for Discussion:

1. What makes our customers valuable to us? (Why do we want to continue to do business with them?)

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2. The proper identification and handling of complaints provides what benefits?

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3. How can we make it easier for our customers to complain?

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It is important to have a system to document and keep track of customer complaints. This will help you ensure that every complaint is taken care of, as well as identify recurring problems or areas that are creating irritation. As a group, identify information that should appear on a customer problem resolution (CPR) form. Using the back of this worksheet, create a CPR form - draw what the form should look like.



## HANDLING THE IRATE CUSTOMER

**Note:** The worksheet for this lesson is two pages.

**Do:** 5 minutes

1. Ask participants to think of a specific instance in which they had to deal with an upset/irate/angry/emotional customer.
2. Ask for volunteers to share how they felt when the conversation/situation was finished. For time's sake, try to keep the conversation focused on their feelings, not on telling the story of the incident. (Possible answers: tired, frustrated, irritated, angry themselves, proud that they calmed the other person down.)
3. Ask what our normal reaction is when someone attacks us with anger. Discuss briefly the feelings you have, but hopefully hide, like wanting to strangle the person, or hit them or yell back. This can be done tongue-in-cheek!

**Show video:** 3 minutes

**Do:** 10 minutes

4. Discuss the questions on the worksheet.

**Activity:** 10 minutes

5. Divide the groups into pairs. Have one person play the part of an irate customer using a typical scenario in your business. Have the other person respond using the empathy statements and consciously thinking about voice control. Give them 2 minutes.
6. Switch partners so that both people get to practice the response techniques.
7. Discuss how the techniques worked. Stress that a new skill does not immediately feel comfortable, but can be effective.
8. Review the ziggets of this lesson.

**continued**

### **Ziggets:**

- Never lose your cool with an emotional customer
- Help your customer climb the mountain of anger by being neutral on the climb up and by cushioning the fall with empathy statements
- You can agree with their feelings, if not their facts
- Use action-oriented statements when discussing the solution

## HANDLING THE IRATE CUSTOMER

### Video Notes:

- Never lose your cool! Never get emotional
- Allow your customers to climb the mountain of anger
- Use any or all of the empathy statements to cushion their fall
  - I understand...
  - I agree...
  - I know...
  - I see/hear...
  - You have every right to feel that way...
- Use action-oriented words when discussing the solution

### Questions for Discussion:

1. What does our first response need to be in order to deal effectively with an irate customer?

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2. What is the problem with trying to argue with the irate person?

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3. What does it mean to empathize with your customer?

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**continued**

## CUSTOMER SERVICE: LESSON #6 - WORKSHEET (CONT.)

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4. How do you agree with them (the last empathy statement) without saying you or your organization is to blame for everything that is wrong?

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### **Activity:**

Pair up with someone and role play a typical irate customer situation. Each of you will have a chance to play the person to handle the situation. Use the information you heard on the video and in the discussion to de-fuse the situation.

## CREATING A POSITIVE IMAGE WITH CUSTOMERS

**Note:** The worksheet for this lesson is two pages.

**Do:** 10 minutes

1. Ask participants to write down the specific name of a company that they like to do business with. Then, ask participants to write down the specific name of a company that they don't like to do business with.
2. Discuss the difference between companies where they like doing business and those that they don't like. (You want to steer the discussion towards attitudes exhibited by the employees at those businesses. At the places we like, employees are usually friendly and knowledgeable, and at the places we don't like, they are usually rude and unhelpful).

**Show Video:** 5 minutes

**Do:** 10 minutes

3. Discuss the questions on the worksheet.

**Activity:** 5 minutes

4. Divide the group into pairs. Review the instructions on the worksheet. Remind the group that attitude (or image) is expressed through word choice, tone of voice and body language. This activity should move along quickly. After each person has participated, ask these follow-up questions:

- Did your partner guess accurately between positive and negative emotions?
- What did you do to express the emotions?
- What did you learn from this activity?

5. Review the ziggets of this lesson.

**continued**



### **Ziggets:**

- Each employee has control over how the customer views the business
  
- There are specific things you can do to project a positive image:
  - Careful word choice
  - Courteous tone of voice
  - Positive body language

## CREATING A POSITIVE IMAGE WITH CUSTOMERS

Name a company that you like doing business with.

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Name a company that you do not like doing business with.

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What makes the difference?

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### Video Notes:

- YOU are the entire company in the customer's eyes
- To create a positive image with your customers, think carefully about:
  - Word choice
  - Tone of voice
  - Body language

### Questions for Discussion:

1. What did I learn from the video?

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2. How do our customers view us now?

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**continued**

## CUSTOMER SERVICE: LESSON #7 - WORKSHEET (CONT.)

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3. How do we want them to view us?

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4. What can I do to make our customers have that image?

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### Activity:

Simulate a realistic interaction with a customer by either standing where you can see each other or sitting with your back to your partner to act as if you are on the phone. Decide which attitude you are going to communicate, choosing from the list below. Pretend to greet the "customer." Your partner will try to guess after you are finished which attitude you were communicating. Repeat until you have tried 3 different attitudes (choose at least one positive). Then it is your partner's turn.

### Attitudes to choose from:

*Fatigue*  
*Irritation*  
*Anger*  
*Preoccupied*  
*Rude*  
*Ready to help*

*Boredom*  
*Enthusiasm*  
*Hurried*  
*Indifferent*  
*Angry*  
*Calm*

## CUSTOMER SERVICE AS A SYSTEM

**Do:** 5 minutes

1. Ask for volunteers to share a customer service "hero story" - an instance when one of their coworkers went beyond their duty to serve the customer. You may want to have an example prepared to get the discussion started.

**Show Video:** 4 minutes

**Do:** 20 minutes

2. Give the participants 5 minutes to write their job descriptions. Emphasize that they are writing their responsibilities in light of servicing the customer. Have volunteers share their answers.

3. Divide the group into smaller work teams of 3 people. Give them 3-4 minutes to work on Part B. Have each team share their answers and consolidate the information into one or two sentences.

4. Part C can be done as a large group - try to think of every possible moment of truth a customer can experience.

5. Depending on your time, you may assign different questions of Part D to smaller work teams, or you may discuss as a large group. Part D is very important, so plan on spending an adequate amount of time on this part.

6. Review the ziggets of this lesson.

### **Ziggets:**

- Good customer service happens when everyone works together to make the customer happy
- Determine what your business's moments of truth are and analyze where improvements are needed



## CUSTOMER SERVICE AS A SYSTEM

### Video Notes:

- Your job description must include how you will serve the customer
- When the customer wins, you win also
- Determine how you want the customers to feel after they have done business with you
- Manage moments of truth

### Activities:

**A.** On the back of this worksheet, write a job description emphasizing how you work for the customer. Include what authority or processes you require to deliver sensational service. Be prepared to share with the group.

**B.** As a group, write a description of how you want the customer to feel after doing business with you.

**C.** Continuing to work as a group, list all the moments of truth that occur for your customers. Remember, a moment of truth is any opportunity or contact a customer has to get an impression of the level of service you deliver.

**D.** Now, analyze those moments. Are all the moments adding up to a level of service that has the customer feeling the way you described in Part B? Does something need to be changed? Looking at the list you created, circle all the moments of truth that you feel could be improved and discuss what steps need to be taken to improve them. Underline all the moments of truth in which you are doing an outstanding job. Take a moment to congratulate yourself!

