

Module A:

Customer Service

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OVERVIEW

Introduction

This module will help improve your customer service skills at WIC.

Learning Objectives

After completing this module the Trainee will be able to do the following:

- Identify internal and external customers
 - Define good customer service
 - Identify behaviors that can damage a team
 - Explain why good customer service is important at WIC
 - Describe possible outcomes of bad customer service at WIC
 - Identify three important parts of welcoming participants
 - Define the importance of good customer service, within the agency
 - Show how to give good customer service, while in a conflict situation
 - To identify and explain the importance of *Emotional Trigger Words*
-

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WHAT IS CUSTOMER SERVICE?

Definition of Customer Service

Customer service is how we meet the needs of the people who use our services.

Definition of a Customer

A customer is any person who uses our services.

Types of Customers

External and internal are the two types of customers we serve.

External Customers

External customers are the people who are using or have used the services of your agency. Examples of external customers are current or former participants, referring agencies, and food stores.

Internal Customers

Internal customers are the people you work with. Examples of internal customers are your supervisor, co-workers, or anyone else who works within your agency.

We do not think of our co-workers as customers. For you to do your job well, you need the help of your co-workers as much as they need you. By treating your co-workers as an important customer, you will provide good customer service to your external customers as well.

Levels of Customer Service

There are three levels of customer service. These include the following:

- Rudeness
- Indifference
- Exceptional service

Most customers (68%) stop doing business with a company due to rudeness or indifference. At WIC we strive for exceptional service!

At WIC we strive for exceptional service.

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WHAT IS CUSTOMER SERVICE? *(continued)*

Team Building

Good customer service can build a team just as easily as bad customer service can breakdown a team.

Some examples of actions that can breakdown a team include the following:

- Gossiping
 - Criticizing a co-worker in front of internal or external customers (co-workers or participants)
 - Constantly correcting others
 - Avoiding difficult jobs or participants, and not carrying fair share of workload
 - Not willing to help others
 - Arriving late or leaving early
 - Frequently calling in sick
 - Spending too much time on personal calls
-

[Platinum WIC Services](#) (Participant-Centered Services) – The California WIC Participant Centered Services Approach puts the WIC family at the center of everything we do and focuses on the strengths of participants, employees and community.

[Engaged Staff](#) – Engaged Staff training supports the engaged staff domain represented in the *Platinum WIC: Participant Centered Services (PCS) model*. The training incorporates customer service principles and examines key employee engagement drivers to build strong teams and develop a service culture. This interactive training is designed to motivate staff engagement by building on personal strengths and contributions, and driving customer service through team camaraderie. Additionally, attendees will leave the training with a proposed action plan to take back to their agency.

WHY IS CUSTOMER SERVICE IMPORTANT?

Participant Satisfaction

WIC depends on its employees to satisfy its customers. When staff gives poor customer service the participant suffers.

If a WIC participant does not feel satisfied with her/his experience at WIC, s/he may not come back. S/he may then miss out on getting the four main types of service we offer:

- Healthy tips
 - Nutritious foods
 - Useful nutrition education
 - Important referrals
-

WIC Funding

Although our customers need our services, we also need them. Your WIC agency gets a certain amount of money for each participant it serves. If participants do not come back to your agency because of poor customer service there could be less money for your agency to pay for staff.

Cost Effectiveness

Good customer service also helps WIC be cost-effective. It helps prevent the following:

- Missed appointments
 - Time spent enrolling or counseling participants who do not come back
-

Learning Activity 1

To learn more about the importance of customer service you may want to try **Learning Activity 1** found at the end of this module.

GIVING EXCEPTIONAL CUSTOMER SERVICE

Exceptional Customer Service

Exceptional customer service consists of the following:

- Anticipates the customer’s needs
- Tries to understand what the customer is thinking
- Meets and exceeds the customer’s highest expectations

Basic Customer Needs

There are four basic customer needs. A customer needs to feel the following:

- Welcome
- Understood
- Important
- Comfortable

Meeting Basic Customer Needs

When working with a participant you will want to make sure you meet their needs. You may want to use the suggestions below to guide you.

| NEED | SUGGESTIONS |
|--------------------|--|
| Welcome | <ul style="list-style-type: none"> • Be friendly • Greet participant and their family members • Smile • Introduce yourself • Use a positive tone of voice • Let participants know what is going to happen during their appointment • Provide estimate of time the appointment will take |
| Understood | <ul style="list-style-type: none"> • Listen carefully • Repeat or rephrase to make things clearer |
| Important | <ul style="list-style-type: none"> • Refer to participant and family by name • Show interest in participant’s family • Ask what questions they have • Ask what else you can help them with • Respond to questions and concerns • Thank participant for coming |
| Comfortable | <ul style="list-style-type: none"> • Explain what to expect during the session • Use open body language • Show concern |

GIVING EXCEPTIONAL CUSTOMER SERVICE *(continued)*

Customer Perceptions

Perception is how we see, hear or understand a situation.

- What is **heard**, not what is said
- What is **seen**, not what is shown
- What is **understood**, not what is meant

A customer's perceptions are the customer's reality.

Determining Perceptions

Understanding a customer's perceptions is not easy. No two people see a situation exactly the same.

A customer does NOT always think the way you do. S/he may therefore not see a situation as you do. Always check to see what the customer is thinking. Never make assumptions.

Here are some questions to help you find out what your WIC participants need or are thinking:

- *How can I help you?*
 - *What concerns do you have?*
 - *What would you like to talk about today?*
 - *What do you think about _____ (what we just talked about)*
 - *What are your questions?*
-

Meeting & Exceeding Expectations

To give exceptional customer service you will need to make sure you know your customer's attitudes, beliefs, ideas and feelings. In other words, try to see things the way your customer does. This will help you meet and exceed their expectations.

Learning Activity 2

To learn more about what customers need and their perceptions you may want to try **Learning Activity 2** found at the end of this module.

STATEMENTS TO AVOID

Statements Can Hurt Communication

Some statements can hurt communication. They can cause a participant or co-worker to become angry or upset. While communicating, be careful of what is said. Be aware of these statements. Avoid them when communicating with participants and co-workers.

Statements To Avoid

Try to avoid making the following kinds of statements:

- Using “you” messages such as “You did not fill out this form correctly”
 - Giving orders
 - Using “should have” or “have to”
 - Focusing on what cannot be done
 - Using “always” or “never”
-

“You” Messages

Limit the use of “you” messages. When someone hears such a message s/he may feel blamed. No one wants to feel blamed.

Use “I” statements, such as “I noticed some parts of the form need completing”.

Giving Orders

Giving orders should not be used at all. When someone is told what to do s/he may feel talked “down” to by you.

“Should Have” or “Have To”

Limit using statements telling the person what s/he “should have” done or “has to” do. When someone is told “you should have...” or “you have to...,” s/he may feel as though they are being judged or not being given the opportunity to take responsibility.

Focusing on What Cannot Be Done

Focus on what CAN be done not and on what CANNOT be done. People may become disappointed, frustrated, and/or sometimes even angry when they hear what CANNOT be done.

“Always” or “Never”

Limit the use of “always” and “never”. When someone hears these words s/he may feel judged and also a need to defend her/himself. It is better to be specific.

ALTERNATIVE STATEMENTS

Conflicts

When you try to provide excellent customer service your participant will almost always appreciate it. Sometimes, situations come up when a customer is not happy. While conflicts between WIC participants and staff are usually rare, they may occasionally occur.

Resolving conflict means finding a way to take care of the disagreement or problem so all the people in the conflict can agree.

To learn more about conflict resolution see *Task I Module B: Communication: Verbal and Nonverbal*.

Chart of Recommendations, What to Avoid, and Alternatives

The chart below gives you a list of the previous information:

- Recommendations
- Statements to avoid
- Alternative statements to use

Chart of Recommendations, Statements to Avoid & Alternatives

| Recommendation | Statements to Avoid | Alternative |
|--|--|--|
| Use “I” messages. | You are confusing me. | <i>I am confused. Please help me understand what you mean.</i> |
| Try not to give orders. | <i>Wait here!</i> | <i>Would you please wait here while I talk to my supervisor?</i> |
| Try not to use “should have”. | You should have eaten less fatty foods. | We want you to stay healthy. These recommendations will help you. |
| Try not to use “have to”. | You have to bring your proof of address. | We need to review your proof of address today. |
| Focus on what CAN be done. | <i>It’s not part of my job.</i> | Let me get Lynn, she can help you. |
| Be specific. Avoid using “always” and “never”. | You always forget your medical information. | We need your medical information to complete today’s appointment. |

ALTERNATIVE STATEMENTS *(continued)*

Learning Activity 3

To learn more about what words to use when communicating with participants or co-workers, you may want to try **Learning Activity 3** found at the end of this module.

Learning Activity 4

To learn more about emotional trigger words, you may want to try **Learning Activity 4** found at the end of this module.

Learning Activity 5

To learn more about your communication strengths and weaknesses, you may want to try **Learning Activity 5** found at the end of this module.

ASKING FOR HELP

It's Okay to Ask for Help

Asking for help is okay. All of us may need to ask for help occasionally.

Most of the time you will be able to do your job quite well. But there may be a time when you will have more than you can handle.

It is important to ask for help when you need it. Not asking for help may cause a situation to get worse.

When to Ask

You may need to ask for help during the following situations:

- You are not feeling well
 - Not sure how to handle a situation
 - Dealing with someone who may be angry, over excited or violent
 - Trying to resolve a conflict and cannot reach a workable solution
 - Not comfortable working with a participant
 - In need of help from someone with special skills such as someone who has training in domestic violence
-

Whom to Ask

When you need help go to the person your agency recommends. This may be your supervisor, mentor, or a co-worker. Check to see what your agency's procedure is regarding this.

Learning Activity 6

To learn more about asking for help in difficult situations, you may want to try **Learning Activity 6** found at the end of this module.

PROGRESS CHECK

1. Give an example of each type of customer.

Internal: _____

External: _____

2. What is the most common reason for a customer to stop doing business with a company?

3. List two reasons why good customer service is important.

4. Give two suggestions to meet each of the four basic customer needs listed below.

| Basic Customer Need | Suggestion |
|---------------------|------------|
| Welcome | |
| Understood | |
| Important | |
| Comfortable | |

PROGRESS CHECK *(continued)*

5. Restate each of the phrases so the difficult or negative information is given in a positive way.

| | |
|--|--|
| <p><i>You're wrong---we don't do certification over the phone.</i></p> | |
| <p><i>Sit down. You have a long wait ahead of you!</i></p> | |
| <p><i>The other staff person was wrong! This is not our policy!</i></p> | |
| <p><i>You are disqualified! We can't serve you!</i></p> | |

6. List three situations in which a staff person might need to ask for help.

LEARNING ACTIVITIES

The following activities are included and are recommended for interactive learning:

- **Learning Activity 1:** Your “Best” & “Worst” Customer Service Experience
- **Learning Activity 2:** Customer Needs & Perceptions
- **Learning Activity 3:** Choosing Your Words
- **Learning Activity 4:** Emotional Trigger Words
- **Learning Activity 5:** Assessing Your Communication Skills
- **Learning Activity 6:** Asking for Help

ACTIVITY 1: YOUR “BEST” & “WORST” CUSTOMER SERVICE EXPERIENCE**Learning Objectives**

After completing this activity, the Trainee will be able to identify why customer service is so important at WIC.

Instructions

1. Think back to a time when you were a customer and received the following scenarios:

- The “best” customer service
- The “worst” customer service

Examples may be: a time when you ate in a restaurant, shopped at a store, went to the dentist, or called about a bill.

2. Using the form on the next page, write down a brief summary of your experiences and what made each experience either the best or the worst.
3. You may want to discuss your experiences with your mentor or supervisor.
-

ACTIVITY 1: YOUR “BEST” & “WORST” CUSTOMER SERVICE EXPERIENCE

1. Briefly describe your “**best**” customer service experience.

What made this experience the best?

2. Briefly describe your “**worst**” customer service experience.

What made this experience unpleasant?

What could have made the experience better?

ACTIVITY 2: CUSTOMER NEEDS & PERCEPTIONS

Learning Objectives

After completing this activity, the Trainee will be able to identify how our needs and perceptions greatly affect our satisfaction as customers.

Background

There are four basic customer needs. A customer needs to feel the following:

- Welcome
- Understood
- Important
- Comfortable

Perception is how we see, hear or understand a situation.

- What is **heard**, not what is said
- What is **seen**, not what is shown
- What is **understood**, not what is meant

A customer's perceptions are the customer's reality.

ACTIVITY 2: CUSTOMER NEEDS & PERCEPTIONS

Instructions

1. Ask three co-workers to answer the first question below.
2. Answer the questions at the bottom.

Think about what is important to you when you go out to a restaurant. What determines “exceptional service” when you go out to eat? Think about things such as cost, speed of service, attitude of waiter/waitress, taste, etc.

Coworker 1:

Coworker 2:

Coworker 3:

Based on the responses of your co-workers, how did their perceptions of what is exceptional service differ? How were they the same? Would a restaurant be able to meet the needs of all of its customers?

Why is perception such an important part of customer service?

ACTIVITY 3: CHOOSING YOUR WORDS

Learning Objectives

After completing this activity, the Trainee will be able to change negative statements into positive and customer service appropriate statements.

Instructions

Change the negative statements on the following page into more appropriate and customer service friendly statements.

ACTIVITY 3: CHOOSING YOUR WORDS

1. *Mary Smith, who is pregnant, is new to WIC. She seems shy and does not say much. A WIC staff person says:*

You sure don't say much! Why are you here?

Better words:

2. *Lily Wong walks into the WIC site and is greeted by the WIC staff person who says:*

Sit over there!

Better words:

3. *Mara Brighton has not been breastfeeding her infant. A WIC staff person is counseling her and says:*

You should have nursed your baby.

Better words:

ACTIVITY 3: CHOOSING YOUR WORDS

4. Jennifer Jones has not been on time for the last two visits. A WIC staff person says:

You're never on time!

Better words:

5. Belinda Cane asks a question about her diabetes. The WIC staff person responds by saying:

I'm not supposed to talk to you about diabetes.

Better words:

6. Patricia Long has worked at WIC for over 5 years and has given participant Roberta Sanchez incorrect information on transfers. A WIC staff person is aware of this and says:

You gave Roberta Sanchez the wrong information! You should read our policy manual on transfers.

Better words:

ACTIVITY 3: CHOOSING YOUR WORDS

7. Tim Roberts is a new staff person at WIC. He tells a co-worker:

I cannot do it! I was not hired to do your work.

Better words:

8. Jeff Lode is a Health Educator at WIC who needs some help with his outreach work. He says to a nutritionist:

You nutritionists have great ideas, but you never have time for me!

Better words:

9. Jean Pratt is a new WIC staff person who is very enthusiastic about her work. A WIC staff person notices Jean does not always keep participant information confidential. The WIC staff person tells a co-worker:

Jean Pratt sure is inexperienced! Yesterday she shared confidential information about a participant in the break room!

Better words:

ACTIVITY 4: EMOTIONAL TRIGGER WORDS

Learning Objectives

After completing this activity, the Trainee will be able to identify negative emotional trigger words and change them into positive words.

Instructions

Change the negative “Cannot Do” trigger words on the left into positive “Can Do” words supportive of exceptional customer service.

| CANNOT DO (<i>trigger words</i>) | CAN DO (<i>positive words</i>) |
|---|---|
| "NO" | |
| "POLICY" | |
| "I CAN'T" | |
| "THEY" | |
| "THE COMPUTER" | |
| "IT'S NOT MY JOB" | |
| "WHAT'S THE PROBLEM" | |
| "WAIT HERE" | |
| "YOU'RE WRONG" | |
| "YOUR ALWAYS LATE FOR YOUR APPOINTEMENT" | |
| "I DON'T KNOW" | |
| "YOU SHOULD HAVE" | |
| "THE ONLY THING WE CAN DO IS" | |

ACTIVITY 5: ASSESSING YOUR COMMUNICATION SKILLS

Learning Objectives

After completing this activity, the Trainee will be able to identify personal strengths and areas needing improvement.

Instructions

1. Observe several co-workers communicating with participants and each other.
 2. Think about how you communicate with others.
 3. Use the self-assessment form on the next page to assess your communication skills.
 4. After completing the form you may want to discuss your assessment with your mentor or supervisor. S/he may be able to help you identify how you can make improvements.
-

ACTIVITY 5: ASSESSING YOUR COMMUNICATION SKILLS

| SKILLS | Never | Sometimes | Usually | Always | COMMENTS |
|--|-------|-----------|---------|--------|----------|
| How respectful are you? | | | | | |
| Do you try to avoid judging or blaming others? | | | | | |
| How often are you polite? | | | | | |
| How often are you on time? | | | | | |
| How well do you keep a positive attitude? | | | | | |
| How often do you focus on what can be done? | | | | | |
| How carefully do you listen? | | | | | |
| How often do you wait to make sure you understand what someone says before answering | | | | | |
| How often do you show caring & empathy? | | | | | |
| How often do you give orders? | | | | | |
| How often do you use “I” messages? | | | | | |
| How often do you use “should”, “always”, or “never”? | | | | | |
| How flexible are you? | | | | | |
| Do you keep your messages simple & clear? | | | | | |
| Do you limit interruptions & distractions? | | | | | |
| Do you limit gossiping & complaining? | | | | | |
| Do you show your appreciation of others? | | | | | |
| Specific skills you would like to work on: | | | | | |
| What are your next steps for improving these skills? | | | | | |

ACTIVITY 6: ASKING FOR HELP

Learning Objectives

After completing this activity, the Trainee will be able to know when and who to ask for help at her/his local agency.

Background

You may need to ask for help during the following situations:

- You are not feeling well
 - Not sure how to handle a situation
 - Dealing with someone who may be angry, over excited or violent
 - Trying to resolve a conflict and cannot reach a workable solution
 - Not comfortable working with a participant
 - In need of help from someone with special skills such as someone who has training in domestic violence
-

Instructions

1. Discuss with your supervisor and/or mentor the following situations:
 - When to ask for help
 - Whom to talk to at your agency
 2. Using the information you get from your supervisor and/or mentor, complete the form on the next page.
 3. Use the *Notes* section to write down any information to help you in the future.
-

ACTIVITY 6: ASKING FOR HELP

| SITUATION | CONTACT PERSON |
|------------------|-----------------------|
| | |
| | |
| | |
| | |
| | |

Notes:

PROGRESS CHECK ANSWERS

1. Give an example of each type of customer.

Internal: **co-workers or a supervisor or anyone who works within an agency.**

External: **participants, referring agencies, or WIC food stores**

2. What is the most common reason for a customer to stop doing business with a company?

Most customers (68%) stop doing business with a company because of rudeness or indifference.

3. List two reasons why good customer service is important.

ANY TWO OF THE FOLLOWING REASONS ARE FINE:

- 1. Good customer service helps WIC be cost-effective**
- 2. Good customer service helps WIC satisfy participants**
- 3. Good customer service helps WIC agencies get funding**
- 4. Good customer service maintains WIC caseload**

4. Give two suggestions to help meet each of the four basic customer needs listed below.

| Basic Customer Need | Suggestions (any two for each is fine) |
|---------------------|--|
| Welcome | <ul style="list-style-type: none"> • Be friendly • Greet participant and their family members • Smile • Introduce yourself • Use a positive tone of voice • Let participants know what is going to happen during their appointment • Provide estimate of time the appointment will take |
| Understood | <ul style="list-style-type: none"> • Listen carefully • Repeat or rephrase to make things clearer |
| Important | <ul style="list-style-type: none"> • Refer to participant by name • Show interest in participant's family • Ask open-ended questions • Answer questions • Thank participant for coming |
| Comfortable | <ul style="list-style-type: none"> • Explain what to expect during the session • Use open body language • Show concern |

PROGRESS CHECK ANSWERS *(continued)*

5. Restate each of the phrases so the difficult or negative information is given in a positive way.

HERE ARE SOME SUGGESTED RESPONSES:

| | |
|--|--|
| <i>You're wrong---we don't do certification over the phone.</i> | <i>I'm sorry if we gave you the wrong information. Our policy is to only certify applicants in person at a WIC site.</i> |
| <i>Sit down. You have a long wait ahead of you!</i> | <i>Please feel free to take a seat. The wait may be an hour. Will this work for you?</i> |
| <i>The other staff person was wrong! This not our policy!</i> | <i>I can understand how you might be confused. Let me explain our policy to you.</i> |
| <i>You are disqualified! We can't serve you!</i> | <i>You are no longer in a category served by WIC. Is there anything else you would like me to do for you?</i> |

6. List three situations in which a staff person might need to ask for help.

ANY THREE OF THE FOLLOWING SITUATIONS ARE FINE:

When a staff person is:

1. ***Not feeling well***
2. ***Not sure about how to handle a situation***
3. ***Dealing with someone who may be violent***
4. ***Trying to resolve a conflict and cannot reach a workable solution***
5. ***Not comfortable working with a participant***
6. ***In need of help from someone with special training such as someone who has training in domestic violence***