



THE GOLD STANDARD OF CUSTOMER RELATIONS

Preparation for Adult Workshop

1. SCHEDULING

To accommodate your business partner, it is important to schedule the introductory workshop at a time and place convenient to the business. We encourage managers to pay employees for their time in the workshop, and back-to-back workshops can be scheduled so that some employees participate while other staff maintain normal work schedules. At the end of the first workshop, participants can rotate so that everyone participates in the training workshop.

2. MEETING WITH THE BUSINESS OWNER OR MANAGER

At least a few days before the first workshop, organizers should meet with the general manager or owner to explain the concepts embodied in the Gold Standard of Customer Relations.

- a. **Develop a partnership with the manager.** Since the Gold Standard is based on partnerships with customers, it is important to establish a partnership with the manager so that he or she understands the concepts behind the curriculum. The Gold Standard may require a change of mindset for the manager. More than one meeting may be necessary.
- b. **Concepts to cover with the manager before the first workshop.** The Gold Standard asks managers and employees to think differently about customer service than they may have in the past. Many managers think that customer service is defined by the way the company handles transactions with customers, and that quality service involves providing a product to the customer in a clean, friendly environment. While those are important issues, research indicates that the concept of creating a relationship is essential in every part of the business.
- c. **All hands on deck.** Often, managers see the marketing department or the sales department as responsible for quality customer service. In the Gold Standard philosophy, every employee is responsible for creating a relationship with customers and is ultimately responsible for the success of the business. This includes delivery people, janitors, receptionists, and employees that never directly interact with the customer, such as the bookkeeper. This philosophy is important to convey to the manager. We expect that every employee will attend the Gold Standard introductory workshop.
- d. **Inform managers of curriculum content and time needed.** We have found that some managers like a copy of the PowerPoint presentation while others are comfortable with an outline of what we will cover. At this time, we advise that the workshop organizer ask managers if there are any issues that the manager would like covered; those issues should be included somewhere during the workshop. Examples of issues brought up by managers have ranged from a dress code for salespeople to orderliness in the workspace. While none of these are the core of the curriculum, we find that accommodating the manager's wishes is one way to develop a relationship with that manager and get a sense of what is happening in the business. In fact, we encourage you to customize slides so that they are appropriate for the business. For example, along with adding what the manager wants covered, you might adjust the art to reflect the business. For a golf resort, we used a great deal of clip art that reflected golfing.



- e. **Owners and managers are key.** We have found that some business owners blame employees when customer service does not meet high standards. We want managers to understand that quality service is a top-down philosophy. In the Gold Standard curriculum, managers are the personal role model for the people they employ. Employees see the manager deal with and talk about peers, contemporaries, employees, and customers, and this usually conveys what the REAL rules are in the organization. Likewise, how the manager rewards employees clearly tells them what is important.
- f. **Set clear standards.** We have worked with businesses that do not have customer service detailed in job descriptions and do not set standards with employees for what the manager considers quality customer service. It is vital that managers set clear goals for what is expected of employees when dealing with customers, models that behavior, and rewards the behavior when employees do a great job. The reward does not have to be financial (although that helps). The reward can be a verbal pat on the back, a special parking space for customer relations employee of the month, or extra time off, if that is valuable to the employee. It is important that managers understand what employees value so that rewards are appropriate; and this leads to a manager-employee relationship based on mutual understanding. Relationships within the business are as important as relationship with customers. If the workplace has employees who do not feel valued or do not receive recognition when they do well, customers quickly pick up on the negative atmosphere.
- g. **External customers.** Customer service is also important with those providing a product or service to the business. They deserve the same kind of customer relations as do paying customers. Why? Because they also tell others about the service they received at your business.
- h. **After the workshop.** Let managers know that this two-hour workshop will not solve all of their customer relations problems, nor will it change every employee's behavior. We talk about the power of reinforcement and the necessity of establishing customer relations norms that are rewarded and repeatable. We encourage managers to meet weekly or bi-weekly with employees to review the concepts of the workshop. We also encourage managers to think of this workshop as something that they might want to repeat annually. We remind managers that behavior change takes time. When employees are back on the job, they may forget most of what they learned unless managers encourage and support the application of the new information and skills. Managers create that supportive environment through rewards, "quality control" meetings to remind everyone about workshop concepts and behaviors.

3. MAKE THE WORKSHOP YOUR OWN

Change or rearrange PowerPoint slides that do not fit your delivery style. Go through the script and change wording so it fits you. Add activities to customize.



- a. **Delivery.** We recommend that two people give the workshop. This is a high-energy program and we have found that two people who work well together are better able to deliver a quality program. Keep your delivery light and fun. Personal stories are important. As you deliver the program, think of your own customer relations experiences. You do not have to share a personal story for every key, but try to think of at least one or two to share. We have provided examples in the script for two of the six keys of customer relations. Try to keep your stories positive and humorous.
- b. **Material preparation.** All materials are located in the Supplemental Materials section. These include:
- **Activities:** optional activities are available in the workshop materials section. Suggestions for scheduling activities during the workshop are given in the Presentation Script. They are only suggestions and the workshop leader should feel free to schedule activities as they wish.
 - **Key definitions:** the cornerstones of the Gold Standard workshop are the six key attributes that are discussed in the presentation. Copy the key definitions and put one definition on each table. These definitions will be used during the presentation as a small group activity.
 - **Participant note cards:** placed on tables and available for participants to capture their thoughts during the presentation.
 - **Inspirational quotes:** the atmosphere that we strive for in the Gold Standard of Customer Relations workshop is upbeat and inspiring. Print out several inspirational quotes and scatter them around the room to help achieve the desired atmosphere.
 - **Completion certificates:** given to participants at the end of the program. Ask the manager for names so that you can complete the certificates ahead of time
 - **Evaluations:** evaluation surveys are essential in determining the effectiveness of a program.
- c. **Customer service video.** Select a short customer relations video to view—this video adds value and energy to the presentation. Two suggestions are “Catch the Fish Philosophy” and “Give ‘em the Pickle.” Both are listed in References and Resources. Find a video that works with your presentation style and audience. Many sources provide discounts to educational institutions.



4. DAY OF PRESENTATION

- a. **Room set-up.** This is an important part of the successful delivery of the customer relations curriculum. We have found the most successful room set-up is to use several tables scattered around the room. While round tables are best, we often do not have a choice, and sometimes we do not have a choice about set-up. Be flexible! Plan for five or six people per table if the tables will accommodate that many. It doesn't matter where people sit. For many, this is the first workshop they have attended on customer service (this is especially true for delivery people, groundskeepers, and janitors) and they are more comfortable sitting with people they know.
- b. **Setting the atmosphere.** We have provided a number of inspirational quotes. You can find more on the Internet or perhaps you already have some that you find especially meaningful. Copy them on bright colored paper and place them on each table. Also, copy the definition of the six keys of high-quality customer relations and place one definition on each table as there is an activity related to the definitions.

Print out and prepare the participant note cards and place on the tables. These note cards are for the participants to use for notes and take home.

Place toys on every table. We have found that even managers have a good time playing with the toys. The toys are an icebreaker, giving everyone something to talk about and toys keep hands busy if people feel out of place. Most importantly, toys move the energy level up, and provide a change of pace from what people might expect at a workshop. Appropriate toys include small balls, light-up balls, or small fish (especially if you are planning to use the Fish DVD or video). Dollar stores and on-line party favor stores are great (and inexpensive) sources of toys. A large supply of colorful pipe cleaners scattered liberally about the table encourages people to be creative.

Supply pens or pencils and colorful markers for people to write their names on their name tags. We prefer that people use first names and no titles. We sometimes also put candy on the tables.

- c. **Visibility.** Make sure everyone can see the screen where you will display the PowerPoint presentation and DVD (if available). It is your choice if you hand out a copy of the presentation. We have found that most businesses want a copy, so it may be best to provide that with the other handouts.
- d. **Large easel and pad.** Set up an easel and pad. We use the easel for a warm-up activity, and it provides a great place to keep track of what people say. We provide managers with a Word document copy of everyone's comments within a few weeks of the workshop.