Using the same call center software and expecting different results?

Stop the insanity.

Modernize your contact center.

About the Workshop

NICE CXone provides these workshop materials for you to use in training your staff. They are designed to last approximately 60 minutes making them ideal for conducting over lunch or as a short refresher where needed.

The workshop can be delivered either in person or virtually. Activities sometimes have to be slightly modified depending on the delivery mode, but instructions are in the speaker's notes.

The **ideal number of participants** for a workshop is 12-18 people. This allows for interactions without it becoming too unwieldly. A smaller group limits the participant interactions and puts pressure on a smaller number of people. A larger group may limit the amount of participant interaction simply because of space, time, noise, and other factors.

A **Participant Workbook** is provided. Print these out (black and white printing is fine) or email them to participants to print themselves. This serves as a record that participants can customize and keep as a reminder of the content for later reference. Encourage people to mark it up and truly make it their own. Note that in the upper right corner of each slide is the corresponding PW number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the training room (in person or virtually). This tells people that the workshop is participatory and starts to get them engaged immediately. The first slide (slide 5 in this file) gives instructions for what they should do once they get settled. Be sure to prepare two flip charts, chat pods, open answer poll questions, or whiteboards ahead of time. And be sure to circulate and talk to people, learning who they are and personally welcoming them as they complete this pre-workshop activity.

Introductions: Because this is a short workshop, no time was allotted for each participant to introduce themselves to everyone else. Introductions can easily take 20 minutes, and that's one-third of the time allotted for the entire workshop. Instead, use the pre-workshop activity time to circulate, learn who people are, and introduce them to people sitting nearby. Virtually, participants can introduce themselves in chat as part of the pre-workshop activity.

PRINTING THE LEADER'S GUIDE

The Leader's Guide is the Notes view of this PowerPoint file. The first 4 pages are instructions for the trainer and are hidden from presentation. You can print these pages in slide view to make them easier to read. For the rest of the PowerPoint file, print the Notes pages so that you will have a thumbnail of the slide with speakers notes beneath.

AUDIENCE

This workshop is appropriate for front-line agents handling customer contacts via any channel. With modification, it can be used for other audiences who need to develop their responsiveness to people.

Preparing to Lead the Workshop

The **key factors for success** in the workshop are how comfortable you are with the material and inserting personal stories to help illustrate the content. To get comfortable with the material, plan to start preparing at least one week ahead of time.

- Read through the speaker's notes a number of times over the first couple of days.
- Make notes of stories you could add and points you want to emphasize.
- Do NOT plan to read the speaker's notes word-for-word. The notes provide background information for the trainer to make sure you are comfortable with all of the content.
- You also do not have to cover every bullet on every slide, and participants certainly don't need you to read them off the slide to them. For each tip, you can say here are some things you can do to support this tip, and then just highlight 2-3 of them. Or you can ask participants to look down the list and choose 1-2 they want to discuss. All of the points are in the Participant Workbook, so everyone has a record of them for reference.
- After you have read through all of the notes several times and made your own notations, practice with your own words, adding your stories. Do this at least once a day for several days ahead of time until you can deliver the entire workshop smoothly and confidently.

THE DAY OF THE WORKSHOP

If delivering in person:

- Make sure that the room is setup. If people are going to bring food and drinks, make sure they have enough space for those items. And it can be a good idea to have extra paper towels or napkins available.
- Set up two flip chart pages with the two questions and place them in different places in the room with markers nearby.
- Print out copies of the Participant Workbook and have one at each place.
- Have tent cards at each place for people to write their names upon and display in front of them.
- Make sure you are in the room and ready at least 15 minutes before the workshop is scheduled to begin.

If delivering virtually:

- Make sure you are comfortable with the platform you are going to be using. You should have practiced the workshop on the platform several times ahead of the workshop.
- Email all the participants a copy of the Participant Workbook and encourage them to print them out to use during the workshop.
- Have the pre-activity set up as two open-ended poll questions, a divided whiteboard, or two chat pods (with maybe a third chat pod for introductions).
- Be present in the virtual room at least 15 minutes before the workshop is scheduled to begin.
- As people enter the room, welcome them and start interacting with them.

During the Workshop

- **Relax and enjoy the experience.** You've done your preparation, you know the content, so now it is time to enjoy the final product – the delivery of the workshop.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for "rabbit holes" that become a whole workshop in themselves. If time runs short, you might have to curtail participant interaction, but you definitely want to leave enough time for them to complete an action plan before they leave.
- **Encourage participation.** Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participant think or if they would add anything to the tips. Many will already have experience with the topic and will have good points to contribute. Additionally, dealing with participants' questions as you go along helps to customize each workshop to the people who are present.
- **Tell stories.** Stories help make points clearer and help increase engagement. You want to tell personal stories that are short and to the point. A five-minute story has to be really gripping to keep people's attention, but a short 30 second story can help clarify the content and keep people engaged.
- **"Nudge Your Neighbor" activities:** Keep these to just 30-60 seconds and then move on. People don't have to share with everyone the things they share with just one or two other people during these activities. These activities get the participants to pause and reflect and decide what they might do with the information.

AFTER THE WORKSHOP

Take the time to reflect on your delivery – what went well and what could be improved. Write down a few notes for your future reference.

If you administered an end-of-training workshop, read through people's responses to aid your reflection and improvement.

Congratulate yourself on leading a successful workshop.

Which workshop will you deliver next? NICE CXone has a number of 1 hour training workshops. Browse our catalog and choose your next topic.

Workshop Overview

Topic	Activity	Time Allotted	Materials
Introduction and overview	Presentation Situation to discuss Presentation	3 min 5 min 2 min	PPT 5-6; PW 1-3 PPT 7; PW 4 PPT 8
Responding to what customers say	Presentation with discussion Nudge Your Neighbor	18 min 1 min	PPT 9-15; PW5-8 PPT 16
Identifying and resolving customers' issues	Presentation Nudge Your Neighbor	11 min 1 min	PPT 17-20; PW 9 PPT 29
Practice	Practice and debrief Workshop evaluation, if applicable	12 min	PPT 22-24; PW 10
Close	Presentation Round Robin Action Plan Closing Remarks	3 min 4 min	PPT 25-26; PW 10 PPT 27 PPT 28

Total Time = 60 min PPT = PowerPoint Slide PW = Participant Workbook

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Being Responsive to Customers

A Workshop

Course Overview

Being responsive to customers means:

1. Responding appropriately to what the customers say (either verbally or in writing)
2. Identifying and resolving customers' issues

The **goal** of this course is to address both of these in order to help you be more responsive to customer and creating a more satisfying customer experience.

- Introduction and overview
- Responding to what customers say
- Identifying and resolving customers' issues
- Practice
- Close

A Situation to Consider

You are monitoring calls on Ellen, someone who is generally considerate of other people and handles most calls well.

A customer calls and explains that she needs to return a product her husband had ordered for himself, but he had died suddenly two days earlier.

The woman was struggling to speak, and you, listening to the recording, are almost moved to tears listening to her.

Ellen responds to the customer by asking “Do you have your receipt?”

Questions:

- What are some reasons that Ellen might respond this way?
- What are some better ways to respond to this customer?

The Importance of Emotion

Customers who have an emotional connection with a brand:

- Have a **304%** higher lifetime value
- **71%** are more likely to recommend your brand

Responding to what customers say

How would you define empathy?

Understanding what the other person is feeling from their point of view.

4 Attributes of Empathy

A willingness to take the perspective of the customer

A commitment to stay out of judgement

A desire to understand the customer’s feelings

The ability to communicate your understanding of their feelings

Source: Brené Brown

Types of Empathy

Cognitive

Understanding the other person's emotions

Affective

Feeling the other person's emotions

Compassionate

Reacting to help the other person

Aunt Sally

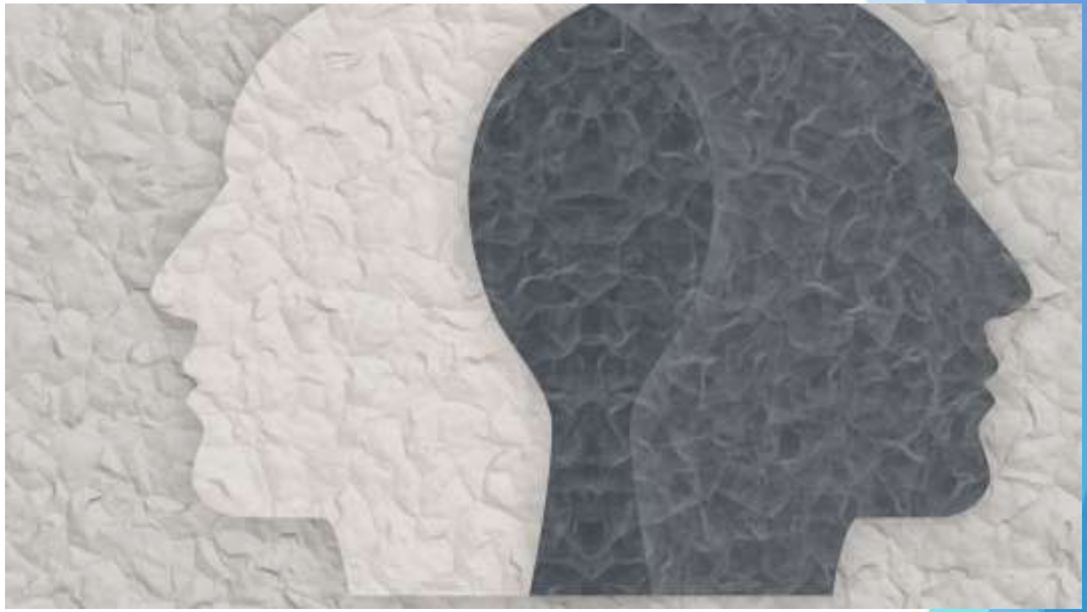
6

Strategies for Expressing Empathy

- Learn to listen deeply
- Get comfortable with statements that show connection without immediate action.
- Try to identify common ground with the customer
- Stay out of judgment
- Reuse the customer’s own words
- Get your “but” out of the way
- Admit mistakes

To Improve Your Empathy Skills

- Identify fears that block your empathy
- Know yourself and your pet peeves
- Increase your EQ – Emotional Intelligence
- Remember that empathy doesn't mean you agree
- Become the customer
- Practice giving empathy in positive moments
- Create empathy maps



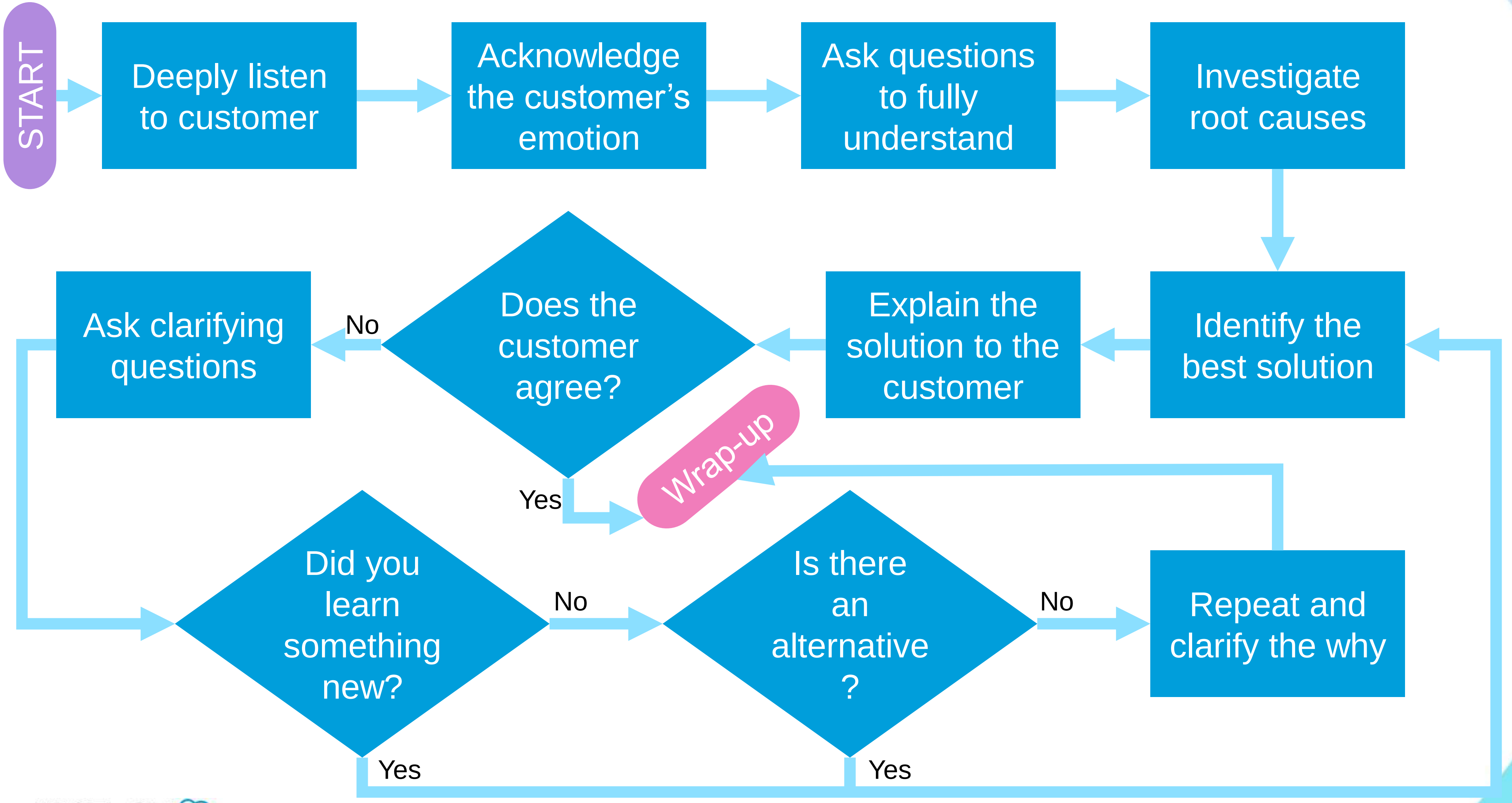
Nudge Your Neighbor

With someone sitting near you, come up with at least 3 phrases that you could use to be empathetic when the customer is feeling strong emotions. You have 60 seconds. GO!

Identifying and resolving customers’ issues

Balancing Speed and Quality

Identifying & Resolving Issues



Strategies

- Stop making excuses
- Stay human
- Personalize messages
- Mix in personalization with templates
- Put the customer first

Nudge Your Neighbor

How does empathy tie in with identifying and resolving customer issues with speed and quality? Tell your neighbor.

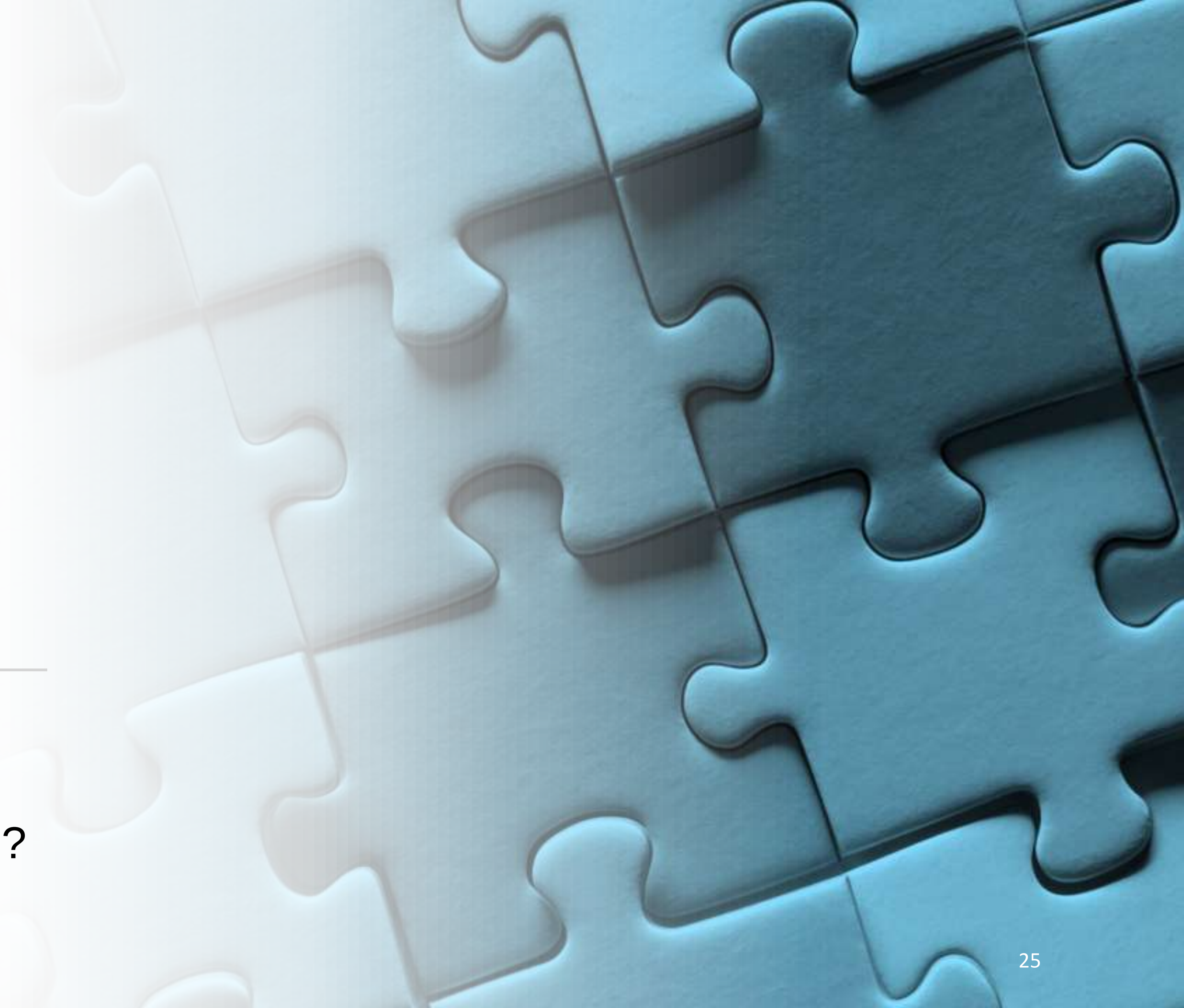
Practice

Practice Being Responsive

- Partner with someone you don’t know well.
- Think of a difficult contact you can share with your partner.
- When you are listening to your partner’s story, practice responding with empathy and quickly identifying the core issue of the story.
- After 3 minutes, switch roles and have the other partner tell their story.
- Give each other feedback on responsiveness.

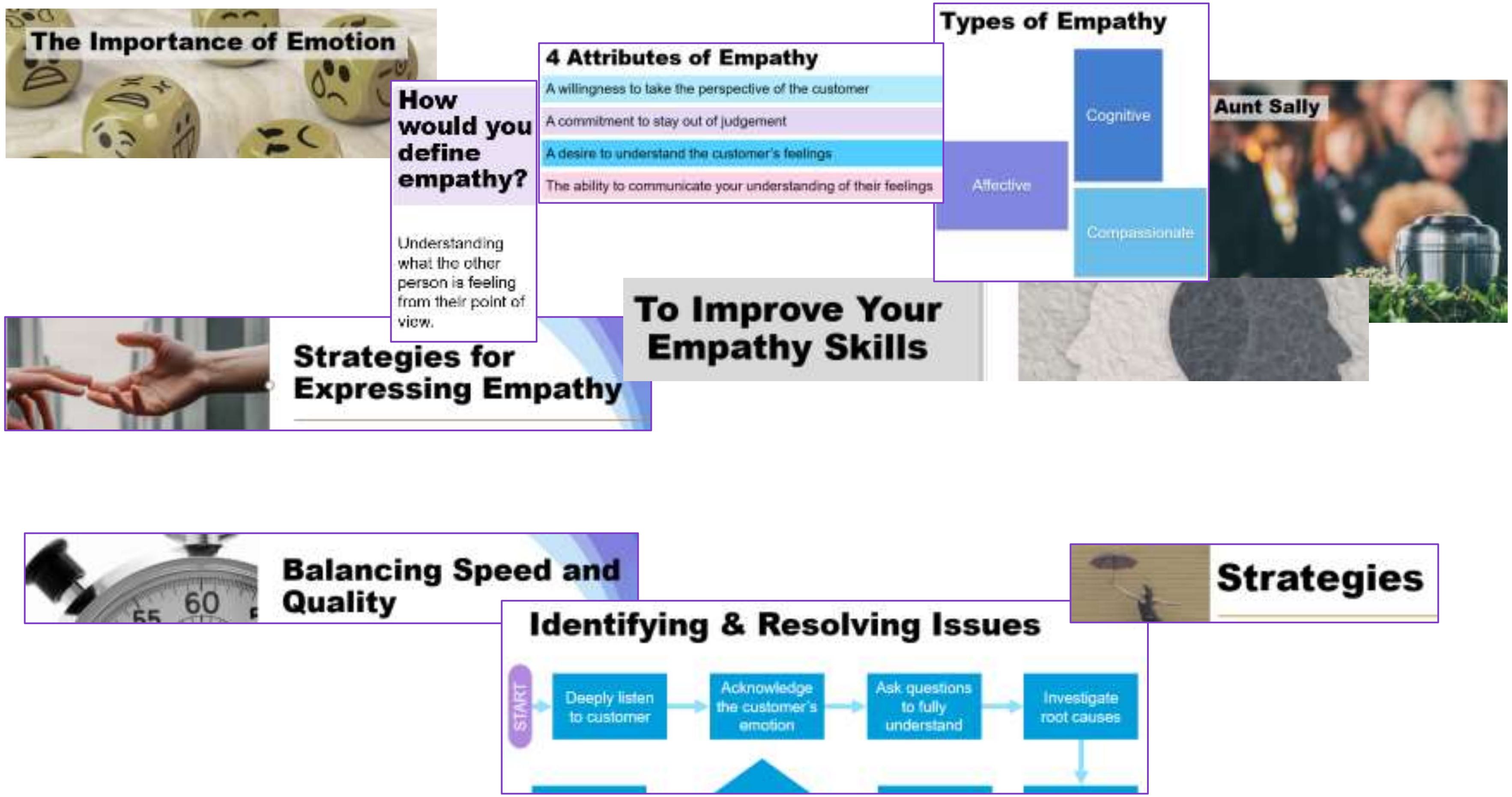
Lessons Learned

What insight did you have about being responsive to customers while practicing?



Close

What We Have Covered…



Round Robin Action Plan

What is one thing you most want to remember and put into action from this workshop?

Being Responsive to Customers

A training workshop

https://www.niceincontact.com/

Developed by Elaine Carr and Laura Grimes
of Harrington Consulting Group
(https://www.harringtonconsulting.us/)

Speakers Notes – Slide 8

Preparation note: You may want to customize this situation to your contact center. Instead of returning a product, it could be cancelling a service, filing an insurance claim, cancel a trip, or whatever kind of situation would be most appropriate for your customer base.

If you have more than 3-5 people, you may want to divide them into small groups (in breakout rooms if virtual) to talk about the situation. But a whole group discussion can also work.

Some points to consider:

- Greeting a stranger on the phone and getting immersed immediately in some strong emotions is rather unexpected. Ellen probably was uncertain just how to express empathy to this stranger and fell back on the routine questions she would use for returns.
- Ellen could have also had things going on in her own life that caused her to distance herself from the customer in order to handle the request. Otherwise, she might have felt like she would fall apart and be unable to handle the call.
- It is difficult to handle other people's strong emotions, particularly when they are unexpected.
- Acknowledging the customer's emotions, however, would have been the better thing to do. Some better ways to respond:
    - "I'm so sorry for your loss. I do have a few questions I need to ask to see if I can take care of this. Let's begin with do you have the receipt from the purchase?"
    - "I'm so sorry for your loss. Let me see how quickly I can take care of this for you as I'm sure you have a lot to pay attention to in this difficult time. Would you happen to have the receipt?"
    - Plus other appropriate responses.

Speakers Notes – Slide 9

This data is from Sitecore. Since you are the ones on the front-line, directly engaging with our customers, you are the ones who have the opportunity to emotionally connect with the customer. This has a direct impact on our business.

- Customers will have a much higher lifetime value to the organization when you connect with them emotionally.
- And 71% of customers you emotionally connect with are more likely to recommend your brand.

In our situation with Ellen, it is important that she not only handle the customer's issue but that she also emotionally connect – however lightly – with the customer in order to not only have the customer feel supported but in order to increase the value of the customer for her business. Experiences that spark powerful emotions shape buying patterns and brand loyalty. That is why this workshop is going to focus on responding well to customers in order to create emotional connections that benefit you and the business.

Speakers Notes – Slide 10

This section is going to be mostly about using empathy with customers.

Speakers Notes – Slide 11

ANIMATED

Discussion:

- Ask for definitions, then <CLICK> to reveal the definition on the slide.
- Is empathy the same as sympathy? How are they different? [Sympathy is a reaction of feeling sorry for someone's situation, which empathy means putting yourself into the other person's shoes and understanding what they are feeling. Sympathy is feeling *for* people while empathy is feeling *with* people.]
- Do you have to agree with the other person's feelings in order to empathize? [No – you can understand someone else's feelings without agreeing with them. It is not about your point of view but the other person's point of view and being receptive to their truth as they see it.]

Speaking Points:

- When you understand the how and why of the customer's feelings, you are then better prepared to solve their problem and meet their needs (which we will get into with the next section).
- Even though we can't always give the customer what they want, we should still empathize and understand their concerns. Customers who feel listened to and understood are more likely to have a positive customer experience even if they don't get what they want.
- Empathy is not the same as being kind – although you can be kind when delivering empathy. Empathetic agents go beyond being nice and polite to establish a real connection with the customers. And we've already established how important that connection is to a positive customer experience.

Speakers Notes – Slide 12

Brené Brown is a research professor who has spent the last couple of decades studying courage, vulnerability, shame, and empathy. She is very well known, and you might have seen her on social media, heard one of her podcasts, or read one of her best-selling books. She also has some good short videos about empathy on YouTube.

She has identified these four attributes of empathy:

- **A willingness to take the perspective of the customer:** Most good things do start with being willing. If you are more interested in your own perspective rather than the customer’s perspective, you won’t very empathetic.
- **A commitment to stay out of judgment:** Remember that you don’t have to agree or disagree with the customer’s feelings – that would be judging. Instead, you are just trying to understand the feelings and to create a connection with the customer.
- **A desire to understand the customer’s feelings:** You do have to go beyond just being willing to actually wanting to understand the customer’s feelings. This helps you be authentic with the customer and take the extra effort required for empathy.
- **The ability to communicate your understanding of their feelings:** To create the connection, you have to go the extra step to communicate your understanding of their feelings – to actually empathize.

Discussion: How do you see these attributes working out in your contacts with customers? Are you able to do all four or are there some aspects you struggle with?

Speakers Notes – Slide 13

Researchers have identified three types of empathy:

- **Affective empathy:** focuses on the feelings and emotions we experience in response to other's emotions. If you have a lot of affective empathy, you can be significantly affected by other people's emotions. It is like the other person's emotions are contagious, and you've caught them yourself.
- **Cognitive empathy:** focuses on our ability to identify emotions of others and understand them without actually experiencing the emotions yourself. This is often referred to as perspective-taking.
- **Compassionate empathy:** focuses on showing compassion and acting to help the other person. It goes beyond just understanding the other person's emotions to being moved to act to help them.

Discussion: What kind of empathy do you think is most appropriate for customer service agents? [Answers will vary between cognitive and compassionate. Affective is definitely not appropriate – if you busy feeling the customer's emotions, how can you help them? Never mind how exhausted you will be at the end of your shift!]

Generally, cognitive empathy is where you understand the customer's needs and concerns and then address them appropriately and accurately. Addressing them may mean that you help them but sometimes you can not, but you still need to connect with them to create a satisfying customer experience.

Speakers Notes – Slide 14

Myra Golden, a customer service guru, tells a story of something she learned from a client. She says that when you go to a funeral, you have three sets of people:

1. In the front row you have immediate family. They are grieving and trying to console one another. There are tears, tissues, hugs, and tremendous pain.
2. In the back pews of the church, you have co-workers, neighbors, and friends. These people are generally not as close to the deceased and their grief and emotion are different. They are not as connected.
3. And in the middle of the church, you have Aunt Sally. Aunt Sally's grief is different. She's not inconsolable. Rather, she's the one handing the immediate family members a tissue or the one who will give a hug. She's not distant and unconnected, like those on the back pews, yet she's not up close and personal with her emotion like immediate family members.

As customer service agents, we should try to be like Aunt Sally – present, connected, and supportive. That's what our empathy should look like.

Speakers Notes – Slide 15

Here are a few strategies for expressing empathy and creating a connection with the customer:

- **Learn to listen deeply:** Deep listening means listening from a deep, receptive, and caring place within yourself. It is listening that is generous, supportive, accurate, and believes that whatever is being said comes from something true in the customer's experience. The listener is suspending their self-orientation and reactive thinking,and opening one's awareness to the other person. It is listening to understand as opposed to listening to respond. It is being fully present and focused on the customer. It means asking good questions to more fully understand the other person. Please note that in written communications, listening is reading carefully – we too often skim through what was written too quickly and miss important points!
- **Get comfortable with statements that show connection without immediate action:** Often you don't know what action is possible until you investigate more. So sometimes we have to convey empathy before we know what action we can take. "Wow, that's horrible" or "How wonderful for you!" are two examples. NOTE: Avoid saying "I understand" since that tends to sound generic and even dismissive.
- **Try to identify common ground with the customer:** Maybe the customer expresses an interest with something you are also interested in, or while you haven't experienced the same thing, you can think of a similar situation and how you felt. This humanizes the connection. You just don't want to get side-tracked with those things or take the focus off the customer and resolving their issue.
- **Stay out of judgment:** We've already talked about this, but it bears repeating. You aren't agreeing or disagreeing, just understanding.
- **Use the customer's own words:** This helps convey that you are listening or reading carefully. It doesn't have to be every word, but if the customer says the cord was flimsy, using flimsy in your reply shows understanding.
- **Get your "but" out of the say:** When you use the word "but" in a sentence, it negates everything that comes before the but. "That sounds truly horrible, but I can not give you a refund on a product that has been used." All the customer hears is that you cannot do what they want. Avoid using the word "but."
- **Admit mistakes:** If you discover a mistake, even if you didn't make the mistake and even if you discover it before the customer does, admit the mistake. It builds confidence with the customer and allows you to control the situation by refocusing the customer on the resolution. You don't have to go into great detail, but don't try to hide mistakes.

Speakers Notes – Slide 17

If you are presenting virtually, you might change this to see how many good empathetic phrases the class can come up with in 60 seconds. They can write these in chat or on a whiteboard.

When you are faced suddenly with strong emotions from the customer (as Ellen was in our opening activity), having a few good, sincere empathetic statements at the ready can help you respond appropriately.

Speakers Notes – Slide 18

Having empathy is the first step in being responsive, but you have to do more than just be empathetic. You have to use the knowledge of your customer’s situation to identify and resolve their issues. That’s what we are going to cover next.

Speakers Notes – Slide 19

between speed and quality.

Discussion: What makes being fast and accurate and friendly all at the same time difficult?

Speakers Notes – Slide 20

ANIMATED
Here is a process for balancing speed and quality in identifying and resolving customer issues.

- You begin with deeply listening to the customer. <Ask about what deeply listening means>
- [CLICK] Then you acknowledge the customer's emotion in order to make a connection.
- [CLICK] Ask what ever questions you need in order to fully understand the issue. Take care that you don't assume the customer's issue. Just because the last 10 contacts have dealt with the same issues does not mean this customer's issue is exactly the same. Nothing undermines your credibility faster than making assumptions!
- [CLICK] Investigate root causes means you look at customer's record and the accompanying history to see what might be causing the issue. You don't want to just grab hold of the first thing you find but really look deeply (and listen deeply) to make sure you've identified the full issue and the root cause.. A lot of times, agents rushing too quickly to a conclusion means the customer has to contact the center again as the issue was not fully resolved.
- [CLICK] From the possible solutions, identify the best solution for the customer.
- [CLICK] Then explain the solution to the customer. Be sure to briefly explain the reasons for the solution (the why) but focus most of your explanation on how the issue will be resolved (what will happen). Only provide as much detail as necessary as you still want to be speedy and not get carried away with excessive details.
- [CLICK] The next is to find out if the customer agrees with the solution. You usually don't have to ask a direct questions here as the customer is likely to express their unhappiness pretty readily if they don't agree.
- [CLICK] If the customer does agree, move to wrapping-up the call, making sure that you follow through with any actions you need to take to resolve the issue.
- [CLICK] On the other hand, if the customer does not agree with your solution, you need to ask some clarifying questions to understand why they don't agree.
- [CLICK] Did the customer provide new information that changes the solution?
- [CLICK] If so, go back to identifying the best solution and repeat from there.
- [CLICK] If you didn't learn anything that changed the solution, is there an alternative you can offer?
- [CLICK] If there is an alternative, then go back and identify which alternative is the new best solution and proceed from there.
- [CLICK] If you have no alternatives, then you will need to repeat and clarify the why – the reason for the solution – with great empathy and care.
- [CLICK] And then wrap-up the contact.

Obviously, there are a lot of details of call handling missing from this process flow. But it is focused on just identifying and resolving the customer's issue, not all the details of call handling. And the process can work with whatever channel you are working.

Speakers Notes – Slide 21

Here are a few strategies that help in quickly identifying and resolving the customer's issue:

- **Stop making excuses:** The most common characteristic that unsuccessful people share is not owning their failures. Succeeding means fixing problems when you find them. So don't make excuses for being unresponsive; work on being responsive.
- **Stay human:** We know that rushing too quickly to help a customer can also cause problems. Remember to listen deeply and make sure you hear what the customer is really saying – no matter what words they use. It is the human touch that makes all the difference in the customer experience – and that is not something that chatbots and artificial intelligence can supply for us. You are the only who can provide the human touch.
- **Personalize messages:** If you mindlessly send out replies to customers that are generic and robotic, your customers will feel unimportant. So personalize by using the customer's name, use a business-friendly tone, and reuse the customer's words.
- **Mix in personalization with templates:** Templates are wonderful time-savers, but they still need to be personalized. Modify them to fit the customer's situation so they don't sound generic and robotic but indicate the care you and your organization really have for the customer.
- **Put the customer first:** This is what customer experience is ultimately about. If you aren't thinking about the customer, you won't be responsive. Yes, you have to weigh other factors in – organizational polices and performance requirements – but the customer is still your first concern.

Speakers Notes – Slide 22

How do the two sections of the training dealing with responding to customers and identifying and resolving issues with speed and quality tie together?

If presenting virtually, have participants reply in chat or on a whiteboard.

Allow 60 seconds before moving on.

Speakers Notes – Slide 24

This practice uses the story of a contact rather than role playing just to simplify the practice.
If presenting virtually, have the pairs use breakout rooms to practice.

Allow 3 minutes for the first story and then 3 more minutes for the second story.
Bring everyone back together to debrief (next slide), asking what insights they had about being responsive to customer from doing the practice.

Speakers Notes – Slide 25

When everyone is back together, ask them for their insights about being responsive.
Allow a few people to share before moving forward.

Speakers Notes – Slide 27

It's only been an hour, but we have covered a lot of ground in that hour. Here are a few visuals to help remind us of the many different topics we have covered. Any questions before we conclude?

The main point of being responsive is to serve the customer and to create good customer experiences. You want to remain human, deeply listen, and identify and resolve the full customer issue efficiently and with care.

If you are doing an evaluation, administer it before going to the next slide so that it is not the last thing in the workshop, which causes the evaluation rather than the content of the workshop to be uppermost in their minds.

Speakers Notes – Slide 28

Round Robin Action Plan
If there are fewer than 12 people in the class, have everyone stand and one-by-one state the thing they most want to put into action to be more responsive to customers.

If the class is larger than 12, then divide them into smaller but equal groups and each group then one-by-one states their action.

If conducting the class virtually, have participants put their action into chat or on a whiteboard.

Make your concluding remarks and end the class.