

Facilitator Guide

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Introduction

This training will provide PJ Enterprises' telephone operators with basic telephone etiquette skills.

Course Overview

The training will be delivered in two sessions. Each session will be facilitated by two trainers from Team 2.

Course Organization

Two one-day classes	Lesson Title/Description
Lesson 4	Responding with customer-friendly language / Trainees apply customer-friendly language through guided practice.
Lesson 5	Responding with customer-friendly intonation / Trainees apply customer-friendly intonation through guided practice.
Lesson 6	Responding to challenges with customer-friendly language and intonation / Trainees apply customer-friendly language and intonation through guided practice to novel challenges.

Target Audience

- The target audience for this training is P.J. Enterprises Telephone Operators performing customer-service call center duties, as described in the employee handbook.
- General learner characteristics - Male and female individuals who are between 18 and 60 years of age, are culturally diverse, multilingual, well-educated (have a bachelor's degree or higher), have no visual or audio deficiencies, and have varying levels of experience as a customer service telephone operator.

Course Goal and Outcomes

Course Goal

Given a job aid (QRG) while answering a customer's call, respond with etiquette with a 75% positive customer service score.

Course Outcomes

After completing this course, participants will be able to:

- Respond to customer calls with customer-friendly language.
- Respond to customer calls with customer-friendly intonation.
- Respond to challenges with customer-friendly language and intonation.

Class Size

The maximum class size permitted is 30 people; however, the smaller the class size, the better with a minimum of 10.

Hosting Activities

Audiovisual Equipment Requirements

There should be sufficient space for audiovisual media, such as PowerPoint slides, video clips and audio. The following audiovisual equipment is necessary for delivery of this course:

- LCD projector compatible with a notebook computer and cables for proper connection (e.g., InFocus or similar make)
- Web-enabled CBT workstations, such as Up-to-date computer, mouse, browser
- Speakers/headset
- Spare projector bulb
- Electronic remote device to advance slides in PowerPoint presentation, if available
- Projection screen (at least 6' x 6')
- Pointer (preferably laser type)
- Twenty-foot or longer extension cord
- 1-4 Whiteboards with dry erase markers (4 black, 4 blue, 4 red, 4 brown) and eraser, if available
- Flip chart with at least 16 markers (4 black, 4 blue, 4 red, 4 brown)
- Large black markers for participant tent cards (at least one for every two participants should be placed at their workspace)
- All equipment should be placed in the room for the instructors to check at least one hour prior to the course.

Room Requirements

- The room should be large enough to accommodate workspace and chairs for up to 30 participants and 2 instructors plus the aforementioned equipment—a large conference room or classroom.
- Instructors should be able to arrange the classroom as they deem most appropriate given the exact number of participants. (The ideal arrangement allows participants to interact with the

instructors and each other, such as a U- or V-shape arrangement or clusters of work areas. All participants should be able to see the screen and instructors; however, participants and instructors should be able to move about the room without obstruction.

- A preparation table and presentation table should be provided for the instructors. The room should be in a quiet area and have a lighting system that permits convenient dimming of the lights, especially where the screen is located.
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Trainer Coordinator's Responsibilities

The coordinator is responsible for preparing the site prior to the instructor's arrival. Below is a checklist of the items the coordinator should prepare prior to the instructors' arrival. It is recommended that the instructors contact the coordinator to ensure these steps have been taken.

Training Site

Before the instructors' arrival, the coordinator should verify the following accommodations are in place for the training site:

- Selection of a training room is critical to the success of the course. Great care should be taken to select a room that will not be overcrowded, too hot or too cold, or subject to outside distractions. The instructor should contact you with any specific requirements for the training facility.
- Reserve a training room for the duration of the course.
- Check to see if anyone else will be using the room for nighttime functions.
- Determine if materials and equipment can be left in the room. (Training courses requiring special equipment or computers must have after-hours security.)
- Visit the classroom to make certain it meets all the instructor's requirements.

Other considerations for the training room:

- Temperature - Central heat and air (thermostat is accessible by the instructor)
- Adequate shape and size
- Lighting - Overhead fluorescent lights (accessible by the instructor).
- No poles or obstructions
- Accommodations - The classrooms are handicap-accessible, and handicap available bathrooms are nearby.
- Seating - Adequate seating exists to facilitate the training, and the option to reconfigure the floorplan if needed).
- Seating arrangements
- Away from kitchen, construction area or other noise distractions
- Electrical outlets
- Lighting controls

Since a PowerPoint presentation will be used during instruction, make sure to consider the following room accommodations:

- Will shades completely darken all windows?
- Can the lights be selectively dimmed when showing the presentation?
- Will overhead lights shine directly on the screen?
- Can a bulb be removed above the screen or will the whiteboard be too dark?

Final Arrangements

Two (2) weeks before the course:

- Registration forms
- Tent cards for participant names

- Participant Workbooks and Reference Manuals
- Course Evaluation forms
- Class roster form
- Student registration form
- Course Certificates
- Reconfirm the training facilities.
- Discuss the seating arrangements and who will set-up the room.
- Discuss what time the room is unlocked/locked.
- Check to make sure a technician is available in case there are problems setting up the room or if something goes wrong during the course.

One (1) week before the course:

- Prepare directional signs to classroom.
- Email to contractor and instructors the list of participant names (needed for Lesson 2 to be entered into an Excel Spreadsheet by instructor prior to course start date).
- No smoking in the classroom. Signs should be posted or written on the whiteboard.
- Identify smoking areas.
- Determine if snacks are available.
- Identify where telephones are – both for participants to make outgoing calls and to receive incoming messages.
- Distribute a list of places for lunch, along with a map.
- Decide who will welcome the participants and introduce the instructors.
- Special check out arrangements may be made to coincide with the course completion time.
- Determine who will prepare the certificates of training and who will pass them out at the end of the course.

One (1) day before the course:

- Set-up the classroom.
- Organize the participant materials.
- Post directional signs.
- Test all equipment.

During the course:

- Let the instructor know whom to contact if he/she needs assistance.
- Provide a copy of the class roster to all course participants.
- Prepare certificates of training. The time needed to prepare them may be reduced and the appearance improved by using a computer with a graphics program and a laser printer.
- Check with the instructor at least once a day to resolve any problems.

After the course:

Two one-day classes	Lesson Title/Description
Lesson 4	Responding with customer-friendly language / Trainees apply customer-friendly language through guided practice.
Lesson 5	Responding with customer-friendly intonation / Trainees apply customer-friendly intonation through guided practice.
Lesson 6	Responding to challenges with customer-friendly language and intonation / Trainees apply customer-friendly language and intonation through guided practice to novel challenges.

Make certain the instructor has the class roster, course evaluation forms, and student registration forms. The instructor is responsible for submitting these items.

Student Requirements

In addition to the Reference Manual and Participant Workbook, provide notepads and pens, or instruct participants to bring notepads and pens with them.

Course Agenda

Instructor: Presentation Requirements

Before the Training Event

Confirm the training dates, location, and number of participants. (Thirty is the maximum number of participants.)

1. Ensure you have the following materials:
 - Lesson Plan/Facilitator Guide, one copy for each instructor
 - PowerPoint Presentation appropriate to the location of the course
 - Participant Workbook
 - Attendance Sign-in Sheets
 - A computer loaded with PowerPoint
 - An LCD projector compatible with the instructor's notebook computer (e.g., InFocus or similar make)
 - Cables necessary to connect projector to computer
 - Spare projector bulb
 - Electronic remote device to advance slides in the PowerPoint Presentation, if available
 - Learning Assessment
 - Course Evaluation
2. Read and study the Lesson Plan, PowerPoint presentation, and documentation pertaining to the local environment. If using case studies, review ahead of time and select the most appropriate cases studies for your audience. Print the certification of completion for each participant.
3. Arrange for equipment and supplies at the venue. Ensure that you have the following:
 - LCD projector compatible with a notebook computer (e.g., InFocus or similar make), if possible
 - Cables necessary to connect projector to computer, if possible
 - Spare projector bulb, if possible
 - Electronic remote device to advance slides in PowerPoint presentation, if available
 - Projection screen
 - Power strip
 - Twenty-foot or longer extension cord
 - One or more 16' x16' Whiteboards with dry erase pens and eraser
 - Flip charts (at least four)
 - Large markers, assorted colors (at least seven sets)
 - Large black markers for participant name tags (at least one for every two participants)
4. Prepare the agenda (below) on a flip chart page. (Cover the agenda with the flip chart pad's cover or a blank flip chart page, and leave it covered until you review it during the training event, then post it on the wall so it is visible during the entire event.)

Agenda

- Course Introduction
- Lesson 4: Responding with customer-friendly language
- Lesson 5: Responding with customer-friendly intonation
- Lesson 6: Responding to challenges with customer-friendly language and intonation
- Wrap Up/ Q&A

- Course Review / Evaluation
5. Prepare the following ground rules on a flip chart page. (Cover the ground rules with the flip chart pad's cover or a blank flip chart page, and leave it covered until you review it during the training event. Then post it on the wall so it is visible during the entire event.) If time permits, solicit the ground rules from the participants and write them in class.

Ground Rules:

- Participate.
 - Be on time.
 - Stay on task.
 - Share responsibility for training.
 - Listen when others talk.
 - Respect the opinions and attitudes of others.
 - Turn off cell phones and devices.
 - Use flip chart parking lot.
6. Ensure the room is set-up properly (i.e., tables and chairs are arranged to maximize interaction, projectors do not block participants' lines of sight, flip charts are convenient to you and visible to participants, etc.).
 7. Test the equipment.
 8. Arrange materials so they are convenient for you and the participants. On each day of training, ensure each participant's place has:
 - One copy of the Participant Workbook.
 - One name tag and one name tent.
 - One pen and pad (unless participants have been instructed to bring their own).
 - One or more 16' x16' White Board
 - 32 telephones internally or externally connected
 - Flip Chart paper
 - 16 markers (white board or flip chart): 4 black, 4 blue, 4 red and 4 brown

During the Training Event

1. Arrive early. Give yourself plenty of time to get organized. Do quick functionality check of all equipment.
2. Circulate the Attendance Sign-in Sheet each day and after lunch each day. Be sure all participants sign-in.
3. Start on time and stay on track. Keep exercises within their time limits. End discussions when they cease to be productive. Lead participants away from digressions and tangents and back to the lesson.
4. Be available during breaks, after class, and during site visits for questions.
5. Mentor participants during the activities. Walk among groups in class and onsite as they work on their activities, and answer questions and offer guidance as appropriate. Ensure participants are on track as they work. Give constructive feedback during the presentations and discussions.
6. Review Questions: Review the content of each lesson throughout the course to reinforce the learning outcomes for that lesson and to connect to upcoming material. As a general rule, review or discussion questions should be asked every 6-8 slides. Avoid YES or NO questions and try to use open-ended questions to draw participants into the material. Sample review questions are available in the Instructor's guide; however, you can also develop additional questions, as appropriate. Make sure all questions directly relate to and support the learning outcomes.
7. Lesson Outcomes: At the beginning of each lesson, review that lesson's outcomes. Make sure participants are fully aware of the topics to be addressed in the lesson. At the end of each lesson, review the outcomes once again using review questions or an activity/exercise to ensure the outcomes were met.

After the Training Event

Have participants complete Learning Assessments and Course Evaluations. Collect the assessments and evaluations after completion.

Lesson Plans

This section contains the Lesson Plan for each lesson.

Unit Progress: 2 of 2	Unit Title: Telephone Etiquette	Lesson Number: 4 of 6	Lesson Title: Responding with customer-friendly language
Type: Instructor-led Training	Enabling Objective: Respond with customer-friendly language		
Trainee Audience: Telephone Operator	Instructional Question: How can I (trainee) recall and respond with customer-friendly language?		
Facilitator/Trainer Role: Facilitator	Lesson Focus: Guided Practice	Instructional Focus: Skill Secondary: Knowledge	Time: 60 minutes
Preparation: TLO2_ELO1_Pres.ppt; 4 black, blue, red and brown markers; Audio_TO2_ELO1A.mp3; 18 copies of Lesson_4_Handout_1, 18 copies of Lesson_4_Handout_2, pencils/pens			
Slide#	Procedure	Materials	Time (min)
B. S1	I. Prior-Knowledge Warm-Up A. Write the objective on the top of the board: Respond with customer-friendly language. Find four white board spaces large enough for four people. Write Group Black, Group Blue, Group Red, Group Brown, and Goals in the top of the board in each space. Objective: Respond with customer-friendly language Group Black Group Blue Group Red Group Brown Goals	TLO2_ELO1_Pres.ppt (all lesson)	A. 0
	B. Upon entry start give each trainee a whiteboard marker (4 colors, 16 total). The marker color represents groupings, so make sure each you have left over twos or threes. C. Present the objective. Then, tell the trainees that they are going to recall the content of the CBT training. Present S1, which first shows the directions: Recalling Customer-friendly Language Directions: Stand up and take your marker. Look at the marker color. Go to the white board with your marker color. D. Model the directions. Direct trainees to follow the directions.	B. 4 white board spaces	B. 0
E. S2	I. Prior-Knowledge Warm-Up E. Tell trainees to write what they remember about question 1. Show question 1: 1. What is some language you can use for greetings and to close calls?	B. Lesson_4_Handout_1 C. Audio_TO2_ELO1A E. Audio_TO2_ELO1A	C. 1
F. <click>	F. Tell trainees to write what they remember about question 2. Show question 2: 2. What is some language you can use to make customer requests?		E. 2
G. <click>	G. Tell trainees to write what they remember about question 3. Show question 3: 3. What is some language you can use to agree with customer requests?		F. 2.5
H. <click>	H. Tell trainees to write what they remember about question 4.		G. 3
I. <click>			H. 3.5
J. <click>			I. 4

L. S3	Show question 4: 4. What is some language you can use to decline requests? I. Tell trainees to write what they remember about question 5. Show question 5: 5. What is some language you can use to accept responsibility? J. Confirm two correct responses from each group. Try to find different correct responses. K. Show the full list of responses for questions 1-5 to confirm correct answers.	I. Audio_TO2_ELO1A	
A. S4	L. Tell trainees that today we are going to practice these responses so that they become automatic when on customer calls. M. Tell trainees to sit in groups at workstations next to each other.	K. Lesson_4_Handout_1 side 2	
K. S5	II. Absorb Phase A. Tell trainees that they re-listen to a recording from the CBT portion. During this recording, they will write down language they hear using the five categories from the questions: 1. greetings/closings; 2. making requests; 3. agreeing with requests; 4. declining requests; 5. accepting responsibility.		A. 5
L. S6	B. Pass out Lesson_4_Handout_1 side 1. C. Play audio. D. Elicit from each group one response from each category. Make note of called on trainees. Make a check to any responses that were the same. Tell trainees that they will listen again a second time. E. Play audio second time. F. Tell trainees to compare responses with trainees left and right of each other. G. Elicit responses from 4 different trainees. Make note of called on trainees. H. Tell trainees that they will listen again a third time. I. Elicit responses from 4 different trainees. Make note of called on trainees. J. Present responses on slide to confirm responses. K. Tell trainees to turn their Lesson_4_Handout_1 on the back. Tell trainees to reorganize their answers by selecting their 'favorites'. L. Confirm trainees' job aid organization by showing exemplar on slide 6. Also, find 3 trainee job aid organization. Present to class by putting on document camera or holding up while circulating classroom.		C. 6
B. S8	III. Do Phase A. Tell trainees that they will complete a mental rehearsal of the customer-friendly language. Tell trainees that they will see and listen to a slide with a customer comment. Then, trainees will determine how to respond: 1. greetings/closings; 2. making requests; 3. agreeing with requests; 4. declining requests; 5. accepting responsibility. B. Present customer comment 1 on slide 8. 1. "Can you offer full refunds on used products after 30 days?" C. Model a response by saying softly: "Here I can see this a request, so I will say, 'I'm sorry. It is possible to give full refunds for used products. We can offer store credit on used products.'" D. Tell trainees that for each customer response, they will model it in a soft voice so that everyone can hear their own responses. E. Present customer comment 2. 2. "Can you provide 2-day shipping?" F. Present customer comment 3. 3. "Good morning." G. Present customer comment 4. 4. "I just called 5 minutes ago, but the sound kept crackling." H. Present customer comment 5.		E. 7 F. 8 G. 9 H. 10 I. 11 J. 12 L. 15 A. 16
E. S9			
F. S10			
G. S11			
H. S12			
I. S13			
K. S14		N. Lesson_4_Handout_2	E. 18

M. S15	5. "Yes, that is correct. I would like order number #54." I. Present customer comment 6. 6. "I want to make two orders: the starlight candles and Aloe Vera skin lotion." J. Confirm trainees' answers by showing the exemplars. Inform trainees that exemplars are not the only correct response. K. Tell trainees that they will know practice these customer-friendly responses in pairs. Tell trainees who had red markers to find one trainee with black markers. Tell trainees who had blue markers to find one trainee with brown markers. L. Tell trainees that there will be even partners and odd partners. Those with red and blue markers are odd numbers. Those with black and brown markers are even. Any without a pair will join a group of three. M. Tell trainees that they will perform a brief role-play. One role will be the customer role. The customer role will read a customer comment just like the last practice. The telephone operator role will respond just like the last practice. The customer will evaluate the telephone operators' language. Tell trainees that when finished to turn on the back to switch roles. Tell the group of three that they will rotate in threes with a third role that will be the evaluator. N. Pass out Lesson_4_Handout_2 O. Tell trainees to start. P. Monitor trainees. Answer any questions. III. Assessment Phase / Connect Component A. Tell trainees to stop. B. Tell trainees to calculate and deliver their scores to their partners. C. Have trainees complete the goal sheet on Lesson_4_Handout_2. D. Call on two different trainees to share 'what went well'. Board their responses right of Group Brown. Make note of called on trainees. E. Call on two different trainees to share 'what went well'. Board their responses under 'what could have gone better'. If there were no new trainees, it is your choice to call on another two. F. Tell trainees that they will work on these goals in the next lesson about intonation. Answer any questions.	C. Lesson_4_Handout_2	
			J. 23
			K.19
			L .20
			N.21
			A. 40 C. 45 D. 50

Unit Progress: 2 of 2	Unit Title: Telephone Etiquette	Lesson Number: 5 of 6	Lesson Title: Responding with customer-friendly intonation
Type: Instructor-led Training	Enabling Objective: Respond with customer-friendly intonation		
Trainee Audience: Telephone Operator	Instructional Question: How can I (trainee) recall and respond with customer-friendly intonation?		
Facilitator/Trainer Role: Facilitator	Lesson Focus: Guided Practice	Instructional Focus: Skill Secondary: Knowledge	Time: 60 minutes
Preparation: TLO2_ELO2_Pres.ppt; Audio_TO2_ELO1A.mp3; 18 copies of Lesson_5_Handout_1, 18 completed copies of Lesson_4_Handout_1, pencils/pens			
Slide#	Procedure	Materials	Time (min)

B. S1	I. Prior-Knowledge Warm-Up A. Write the objective on the board: Objective: Respond with customer-friendly intonation	TLO2_ELO2_Pres.ppt (whole lesson)	A. 0
	B. Present the objective and directions. Recalling Customer-friendly Intonation Directions: Read each statement. Underline stressed language.	C. Lesson_5_Handout_1	B. 0
D. S2	Draw an upward line above the word to indicate pitch rising. Draw a downward line above the word to indicate pitch falling. C. Pass out Lesson_5_Handout_1 as trainees enter the classroom. D. Confirm trainees' responses. E. Tell trainees' that they will be applying their knowledge of customer-friendly intonation. Add that it is easy to know about intonation, but less easy to make it automatic.		C. 5
	II. Absorb phase A. Pass out trainees' completed copies Lesson_4_Handout_1. B. Tell trainees to complete stress and pitch marks on Lesson_4_Handout_1. C. Confirm trainees' responses.	A. Audio_TO2_ELO2A.mp3	D. 10
C. S3			A. 11
A. S4	III. Do phase A. Tell trainees that they will complete a mental rehearsal of the customer-friendly language. Tell trainees that they will see and listen to a slide with a telephone operator response for exercises 2-5. Then, they will just read a telephone operator response for number 5-10.		
E. S5	1. "I'm sorry. It is possible to give full refunds for used products. We can offer store credit on used products." C. Model a response by saying softly: "Here I can see this is a request," so I will say, "I'm sorry. It is possible to give full refunds for used products. We can offer store credit on used products." D. Tell trainees that for each customer response, they will model it in a soft voice so that everyone can hear their own responses. E. Present customer comment 2. 2. "Of course, we can offer 2-day shipping. May I confirm that you would like to add 2-day shipping to this request?" F. Present customer comment 3. 3. "Good morning. thank you for calling PJ Enterprises. My name is _____. May I ask who is calling?... How may I assist you?" G. Present customer comment 4. 4. "I apologize. Can we call you back from a different line?" H. Present customer comment 5. 5. "Great. You are ordering #333. Is there anything else I can help you with today?" I. Present customer comment 6. 6. "Great! May I confirm your order of the starlight candles and Aloe Vera skin lotion?" J. Present customer comment 7. 7. "I apologize. The date requested is not available. We can ship to you the next day on the 22 nd ." K. Present customer comment 8. 8. "Yes, I can look that up for you right now. Your order will arrive on Tuesday the 6 th in the afternoon." L. Present customer comment 9. 9. "I apologize. There seems to be an update issue. I am emailing you the revised order presently." M. Present customer comment 10. 10. "Is there anything else I can help you with? Thank you for calling PJ Enterprises. Have a good day." N. Confirm trainees' answers by showing exemplars for numbers 5-10. Read each exemplar aloud. O. Tell trainees that they will now practice these customer-friendly		C. 13
<click>			E-N. 14-23
G.			
<click>			
H.			
<click>			
I.			
<click>			
J.			
<click>			
K.			
<click>			
L.			
<click>			
M.			
<click>			
O. S6			
			N. 24

P. S7	responses in pairs. Tell trainees to check their reference number on the bottom right side. Lesson_5_Handout_2. Tell trainees to find another person in the room with the same last number. For example, if a reference number is 392, then that person should find 382. M. Partners with references numbers that have an odd second digit will be odd. Partners with references numbers that have an even second digit will be even. N Tell trainees that they will perform a brief role-play. One role will be the customer role. The customer role will read a customer comment just like the last practice. The telephone operator role will respond just like the last practice. The customer will evaluate the telephone operators' intonation. Tell trainees that when finished to turn on the back to switch roles. Tell the group of three that they will rotate in threes with a third role that will be the evaluator. N. Pass out Lesson_5_Handout_2 O. Tell trainees to start. P. Monitor trainees' responses. Answer any questions. IV. Assessment Phase / Connect Component A. Tell trainees to stop. B. Tell trainees to calculate and deliver their scores to their partners. C. Have trainees complete the goal sheet on Lesson_5_Handout_2. D. Call on two different trainees to share 'what went well'. Board their responses. Make note of called on trainees. E. Call on two different trainees to share 'what went well'. Board their responses. If there were no new trainees, it is your choice to call on another two. F. Tell trainees that they will work on these goals in the next lesson about challenges. Answer any questions.	N. Lesson_5_Handout_2 C. Lesson_5_Handout_2	O. 26 A. 45 C. 50 E. 55
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Unit Progress: 2 of 2	Unit Title: Telephone Etiquette	Lesson Number: 6 of 6	Lesson Title: Responding to challenges with customer-friendly language and intonation	
Type: Instructor-led Training	Enabling Objective: Respond to challenges with customer-friendly language and intonation during customer calls			
Trainee Audience: Telephone Operator	Instructional Question: How can I (trainee) recall and respond with customer-friendly language and intonation when encountering challenges during a call?			
Facilitator/Trainer Role: Facilitator	Lesson Focus: Guided Practice	Instructional Focus: Skill Secondary: Knowledge		Time: 60 minutes
Preparation: TLO2_ELO3_Pres.ppt; Audio_TO2_ELO3A.mp3; 18 copies of Lesson_6_Handout_1, 18 copies of Lesson_6_Handout_2, pencils/pens				
Slide#	Procedure		Materials	Time (min)
E. S1	I. Connect A. Write the objective on top of the board. Find four white board spaces large enough for four people. Write Group Black, Group Blue, Group Red, Group Brown, and Goals in the top of the board in each space. Objective: Respond to challenges with customer-friendly language and intonation Group Black Group Blue Group Red Group Brown Goals B. Upon entry start give each trainee a whiteboard marker (4 colors; 16 total). The marker color represents groupings, so make		TLO2_ELO3_Pres.ppt (all lessons) B. Lesson_6_Handout_1 C. Audio_TO3_ELO1A.mp3	A. 0 D. 1

	sure each you have left over twos or threes. C. Present the objective. D. Tell trainees that they will reflect on problems they've had with a customer. E. Present S1, which first shows the directions: Customer Challenges Directions: Stand up and take your marker. Look at the marker color. Go to the white board with your marker color. F. Model the directions. Direct trainees to follow the directions. G. Tell trainees to write what they reflect about question 1. Show question 1: 1. What challenges have felt you like you were able to solve EASILY? H. Tell trainees to write what they remember about question 2. Show question 2: 2. What challenges have felt you like you were NOT able to solve? I. Tell trainees to write what they remember about question 3. Show question 3: 3. What challenges have felt you like you were able to solve SOMETIMES? J. Call on one trainee from each group. Make note of who was called on. Tell trainees to sit in groups at workstations next to each other. I. Tell trainees that today we are going to apply both customer service-friendly language and intonation when encountering challenges		
G. S2			F. 3
A. S3			A. 10
B. S4	II. Absorb phase A. Tell trainees that they're going to listen to three audio conversations between telephone operators. B. Pass out Lesson_6_Handout_1 side 1. Direct trainees' to question 1. C. Play audio Audio_TO3_ELO1A.mp3 D. Call on one trainee from each group for question 1. Make note of who was called on. E. Direct trainees to question 2. F. Play audio Audio_TO3_ELO1A.mp3 G. Call on one trainee from each group for question 2. Make note of who was called on. H. Direct trainees to question 3. F. Play audio Audio_TO3_ELO1A.mp3 G. Call on one trainee from each group for question 3. Make note of who was called on. If all trainees were called on, choose any trainee. I. Tell trainees to check their answers on Lesson_6_Handout_1 side 2. Direct trainees to fill in examples for each strategy. II. Do phase A. Tell trainees that they will complete a mental rehearsal of the customer-friendly language. Tell trainees that they will see and listen to a slide with a customer comment. Then, trainees will determine how to respond: 1. customer causes challenge; 2. telephone operator causes problem; 3. neither cause problem. B. Present customer comment 1. 1. "Why can't I have a refund after 30 days?" C. Model a response by saying softly: "Here I can see this a request so I will say, 'I'm sorry. It is not possible to give full refunds for used products. We can offer store credit on used products.'" D. Tell trainees that for each customer response that they will model in a soft voice so that everyone can hear their own responses. E. Present customer comment 2.		A. 10 C. 11 I. 20 A. 21 I. 25
D. <click>			
E. <click>			
F. <click>			
G.			

<click> H. <click> I. <click>	2. "Two-day shipping is three days late." 3. "Good morning." G. Present customer comment 4. 4. "I just called 5 minutes ago, but the sound kept crackling." H. Present customer comment 5. 5. "Yes, that is correct. I would like order number #54." I. Present customer comment 6. 6. I want to make two orders: the starlight candles and Aloe Vera skin lotion.	Q. Pass out Lesson_6_Handout_2	P. 26
	N. S5 F. Present customer comment 3. 3. "I just was cut off five minutes ago." G. Present customer comment 4. 4. "I just called 5 minutes ago, but the sound kept crackling." H. Present customer comment 5. 5. "Order #333 is sold out!?" I. Present customer comment 6. 6. "Your voice isn't clear." N. Confirm trainees' answers by showing exemplars for numbers 1-6. Read each exemplar aloud. O. Tell trainees that they will know practice these challenges in pairs. Tell trainees who had red markers to find one trainee with black markers. Tell trainees who had blue markers to find one trainee with brown markers. P. Tell trainees that there will be even partners and odd partners. Those with red and blue markers are odd numbers. Those with black and brown markers are even. Any without a pair will join a group of three. Q. Pass out Lesson_6_Handout_2 R. Tell trainees to start. S. Monitor trainees' responses. Answer any questions.		A. 40 C. 45 D. 55 F.00
A. S6	IV. Assessment Phase A. Tell trainees to stop. B. Tell trainees to calculate and deliver their scores to their partners. C. Have trainees complete the goal sheet on Lesson_6_Handout_2. D. Call on two trainees to share 'what went well'. Board their responses. Make note of called on trainees. E. Call on two trainees to share 'what went well'. Board their responses. F. Tell trainees that they will work on these goals in Final Assessment.		

Unit Progress: 2 of 2	Unit Title: Telephone Etiquette Assessment	Lesson Final Assessment	Lesson Title: Performance-based Assessment
Type: Performance-based Assessment	Terminal Objective: Given a job aid (QRG) while answering a customer's call, respond with etiquette with a 75% positive customer service score.		
Trainee Audience: Telephone Operator			
Facilitator/Trainer Role: Administer	Lesson Focus: Assessment	Instructional Focus: Skill Secondary: Knowledge	Time: 60 minutes
Description: The assessment will be a performance-assessment. It extends the previous assessments in scope and length.			
Organization: Grouping: three	Interaction: Customer: Calls Telephone Operator using a prompt on the final assessment.		

trainees	Telephone Operator: Responds with customer-friendly language and intonation everyday calls and calls with challenges.		
Roles: evaluator, telephone operator, customer	Evaluator: Sits with customer to evaluate customer's telephone etiquette experience with telephone operator.		
Content Script			
Customer A Role Scenarios: 1) Describes a scenario in which a package was delivered late; 2) Asks about candle products and orders a skirt; 3) Communicates an order about scarves while a loud noise is in the background.			
Customer B Role: 1) Asks about a child puzzle while there is a poor telephone connection; 2) Asks about a lamp and orders an evergreen wreath; 3) Asks two questions about a jigsaw puzzle after getting cut-off 10 minutes previously.			
Evaluation			
1) Telephone operator uses polite language three times; 2) Telephone operator gives standard greeting/closing with intonation; 3) Telephone operator responds with customer-service language and intonation while responding to a customer request; 4) Telephone operator responds with customer-service language and intonation during a challenge; 5) Telephone operator requests something for customer by using customer-service language and intonation;			
Facilities/Equipment			
Customer role leaves and goes to different room with Evaluator rule. Customer uses land line phone to call Telephone Operator role. Customer role begins content script.			
Telephone Operator role stays in main classroom. Telephone operator waits and answers customer role's call. Telephone operator responds with customer-service language and intonation.			
Preparation: 18 copies of TO2_Assessment_1, 32 phones (internally or externally connected), speaker phone, pencils, scrap paper,			
Slide#	Procedure	Materials	Time (min)
	V. Final Assessment Phase A. Write names of trainees on TO2_Assessment_1 to make final assessment groups. B. Tell the trainees that they will complete a role-play with three roles: customer, telephone operator, evaluator. C. Tell trainees that they will be using real phones and be separated for the assessment. D. Pass out Lesson_6_Assessment_1. E. Tell trainees to meet with each other and begin. F. Tell trainees to stop. G. Collect Lesson_6_Assessment_1 for scoring. H. Tell trainees that this concludes the training for telephone etiquette and that they have progressed greatly in their competencies of customer-friendly language, intonation and challenge responding.	A. TO2_Assessment_1	A. 0 D. 6 F. 55

Sources:

Tools for Instructor-led Training. (n.d.). Retrieved August 22, 2020, from https://www.nhi.fhwa.dot.gov/resources/ilt_instructor.aspx

PD Facilitator's Guide Template. (n.d.). Retrieved August 22, 2020, from <https://iris.peabody.vanderbilt.edu/resources/pd-providers/sample-pd-activity-collection/pd-facilitators-guide-template/>

Templates for Training Facilitation. (2019, August 19). Retrieved August 22, 2020, from <https://sites.psu.edu/kbenefield/project/templates-facilitator-guides/>