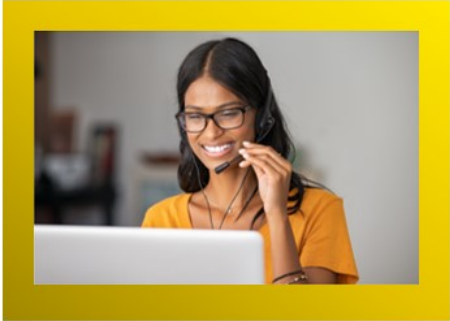


# Computer-Based Training (CBT) Storyboard

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| <b>Project name:</b> CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Screen ID:</b> Overview | <b>Screen:</b> 1 of 45 | <b>Date:</b> August 26, 2020                                                                                                                                                                                 |
| <div><input type="text" value="Search"/></div> <div></div> <div><h1>Welcome!</h1><div></div></div> <td><b>Graphics info</b><p><b>Graphics:</b> Telephone operator</p><p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p></td> |                            |                        | <b>Graphics info</b> <p><b>Graphics:</b> Telephone operator</p> <p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p>                                      |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                            |                        | <b>Audio information</b> <p><b>Recording:</b> Will welcome trainees to the module</p> <p><b>Accessibility:</b> Please note that all audio captions/text will be available via a CC button on each slide.</p> |
| <b>Transcript of audio:</b> Hello, and welcome to PJ Enterprise Telephone Operator Training!                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                            |                        |                                                                                                                                                                                                              |
| <b>Description:</b> Welcome to Computer-based telephone operator training.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                            |                        |                                                                                                                                                                                                              |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Screen ID: Objectives | Screen: 2 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <div data-bbox="657 262 836 304">Search</div> <div data-bbox="844 262 941 304"></div> <div data-bbox="950 262 1047 304"></div> <div data-bbox="1047 262 1112 304"></div> <h1 data-bbox="264 325 727 378">Learning Objectives</h1> <ul data-bbox="264 441 1068 640" style="list-style-type: none"> <li>• Identify customer-friendly language</li> <li>• Recognize appropriate versus inappropriate tone and inflection</li> <li>• Identify strategies to eliminate most interruptions and distraction</li> </ul> <div data-bbox="950 819 1112 871"> </div> |                       |                 | <div data-bbox="1133 262 1255 289"><b>Graphics info</b></div> <p data-bbox="1133 310 1258 336">Graphics: none</p> <p data-bbox="1133 352 1336 436"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1133 619 1302 646"><b>Audio information</b></div> <p data-bbox="1133 672 1352 777"><b>Recording:</b> Will give an overview of what the learner will learn in this session. Content is based off our Terminal Objectives.</p> |
| <p data-bbox="240 924 1344 1012"><b>Transcript of audio:</b> In this session, you will learn how to identify customer-friendly words and phrases you can use when you're talking to customers. You'll also find out how to recognize appropriate versus inappropriate tone and inflection in your voice that could make or break the customer relationship. Finally, you'll discover tools and strategies to help you eliminate most interruptions and distractions so you can focus on your customer's needs.</p> <p data-bbox="240 1050 625 1075"><b>Description:</b> Learning objectives for the course.</p>                                                                                                                                                                                                                                                                                                                                                                      |                       |                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Screen ID: Title Screen | Screen: 3 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                           |
| <div data-bbox="760 275 894 304">Search</div> <div data-bbox="906 275 1105 310">    </div> <div data-bbox="349 338 906 441"> <h1>Identify Customer-Friendly Language</h1> </div> <div data-bbox="337 451 922 829">  </div> <div data-bbox="982 825 1105 861">   </div> |                         |                 | <div data-bbox="1133 266 1255 289"><b>Graphics info</b></div> <div data-bbox="1133 310 1317 333">Graphics: Title Screen</div> <div data-bbox="1133 354 1336 438"> <b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen. </div> <div data-bbox="1133 621 1300 644"><b>Audio information</b></div> <div data-bbox="1138 674 1230 697">Recording:</div> |
| <div data-bbox="240 928 352 970"> <b>Transcript of audio:</b> </div> <div data-bbox="240 1052 526 1075"> <b>Description:</b> Title screen for ELO1 </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                         |                 |                                                                                                                                                                                                                                                                                                                                                                                                 |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Screen ID: Language | Screen: 4 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                 |
| <div>Search</div> <div></div> <div></div> <div></div> <h1>Use Polite Language</h1>  <p>Using phrases to show gratitude like:</p> <ul style="list-style-type: none"><li>• “Thank you”</li><li>• “You’re welcome”</li></ul> <div></div> |                     |                 | <div><b>Graphics info</b></div> <p><b>Graphics:</b> Thank you note</p> <p><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div><b>Audio information</b></div> <p><b>Recording:</b> Will include polite phrases to show gratitude</p> |
| <div><b>Transcript of audio:</b> So just what is considered polite language you might ask? Polite language includes showing gratitude to others. One way you can show gratitude, including saying “thank you” and “you’re welcome.”</div> <div><b>Description:</b> Phrases that show polite language.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                       |                     |                 |                                                                                                                                                                                                                                                                                                                                                                                                       |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Screen ID: Language | Screen: 5 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <div data-bbox="659 264 833 306">Search</div> <div data-bbox="846 264 938 306">i</div> <div data-bbox="951 264 1027 306">?</div> <div data-bbox="1040 264 1117 306">🏠</div> <h1 data-bbox="248 323 639 369">Greet Customers</h1>  <p data-bbox="277 665 518 693">Standard Salutation</p> <ul data-bbox="277 730 505 793" style="list-style-type: none"> <li>• “Good morning”</li> <li>• “Hello”</li> </ul> <div data-bbox="946 835 1105 877">◀ ▶</div> |                     |                 | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <p data-bbox="1133 291 1377 312"><b>Graphics:</b> Note that says hello.</p> <p data-bbox="1133 333 1344 417"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1133 438 1333 522"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1133 621 1300 642"><b>Audio information</b></div> <p data-bbox="1141 674 1357 716"><b>Recording:</b> Will include phrases to greet customers.</p> |
| <p data-bbox="232 915 1360 978"><b>Transcript of audio:</b> Ring, ring. Your phone is ringing and you need to answer it right away. What are the first words out of your mouth when you pick up? When you answer the phone to greet customers, the first words you speak should be phrases, such as “good morning” and “hello.” Greeting the customer warmly these phrases makes customers feel welcome.</p> <p data-bbox="232 1014 570 1035"><b>Description:</b> Examples of good greetings.</p>                                       |                     |                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Screen ID: Language | Screen: 6 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <div data-bbox="657 262 836 304">Search</div> <div data-bbox="844 262 938 304"></div> <div data-bbox="946 262 1024 304"></div> <div data-bbox="1032 262 1110 304"></div> <h1 data-bbox="277 342 1006 447">Identify Our Company and Your Department</h1>  <p data-bbox="282 743 415 772">Be sure to:</p> <ul data-bbox="282 810 669 871" style="list-style-type: none"> <li>• Provide your name</li> <li>• Ask for the customer's name</li> </ul> <div data-bbox="938 829 1097 873"></div> |                     |                 | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <p data-bbox="1133 291 1369 331">Name tag that says "Hello, My Name is."</p> <p data-bbox="1133 354 1341 436"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1133 459 1333 541"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1133 621 1299 642"><b>Audio information</b></div> <p data-bbox="1141 676 1364 758"><b>Recording:</b> Will include intro and methods to answer the phone by identifying your name and company name.</p> |
| <div data-bbox="232 917 326 953"><b>Transcript of audio:</b></div> <p data-bbox="347 917 1386 978">Now that you've picked up the phone and cheerfully greeted the customer with "good morning" or "hello," what should you say next? The next thing you must do is identify your company, PJ Enterprises, and your name. Here's an example of what this might sound like, "Hello, thank you for calling PJ Enterprises. My name is _____. May I ask who is calling?... How may I assist you?"</p> <div data-bbox="232 1041 326 1058"><b>Description:</b></div> <p data-bbox="347 1041 604 1058">Identifying yourself and company.</p>                                                                                                                                                                                                                                                                              |                     |                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Screen ID: Language | Screen: 7 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <div data-bbox="657 262 836 304">Search</div> <div data-bbox="844 262 938 304"></div> <div data-bbox="946 262 1024 304"></div> <div data-bbox="1032 262 1110 304"></div> <h1 data-bbox="261 310 630 363">Closing the Call</h1>  <ul data-bbox="261 653 915 877" style="list-style-type: none"> <li>• Summarize actions you took to help the customer.</li> <li>• Offer to help with anything else the customer needs.</li> <li>• Show gratitude for customers by thanking them for their time</li> </ul> <div data-bbox="946 823 1110 865"> </div> |                     |                 | <div data-bbox="1125 258 1255 279"><b>Graphics info</b></div> <p data-bbox="1125 289 1356 331"><b>Graphics:</b> Photo showing woman smiling with headset.</p> <p data-bbox="1125 352 1372 415"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1125 436 1385 499"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1125 621 1300 642"><b>Audio information</b></div> <p data-bbox="1125 674 1360 716"><b>Recording:</b> Will include how to close the call.</p> |
| <p data-bbox="232 919 1393 982"><b>Transcript of audio:</b> After identifying who you are and the company name, next you need to let the customer know what you've done to help him or her by summarizing the action you just took, for example, "Today you ordered," or "today we were able to." Offer to help the customer by asking "Is there anything else I can do for you?" Finally, show your gratitude by saying, "Thank you for your time. Have a good day."</p> <p data-bbox="232 1035 651 1066"><b>Description:</b> The 7 rules for good customer service.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                     |                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Screen ID: Language | Screen: 8 of 45                                                                                                                                                                                                                                                       | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <div>Search</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                     | <div>    </div> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <h1 data-bbox="245 300 701 359">Making Requests</h1>  <p data-bbox="267 636 915 667">Use Indirect Questions to Make Customer Requests:</p> <ul data-bbox="267 695 615 869" style="list-style-type: none"> <li>• Can I</li> <li>• Could I</li> <li>• Do you mind if</li> <li>• Would it be okay if</li> <li>• Would you mind if</li> <li>• I was wondering if you could</li> </ul> <div data-bbox="950 821 1114 869">   </div> |                     |                                                                                                                                                                                                                                                                       | <div data-bbox="1131 256 1382 281"><b>Graphics info</b></div> <p data-bbox="1131 289 1382 312">Graphics: Woman with headset</p> <p data-bbox="1131 331 1343 415"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1131 434 1333 518"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1131 619 1300 642"><b>Audio information</b></div> <p data-bbox="1131 672 1364 716"><b>Recording:</b> Will include polite phrases to show gratitude</p> |
| <div data-bbox="233 911 1382 974"> <b>Transcript of audio:</b> <p>So now let's find out how you can use customer-friendly language when making requests. Use indirect questions when making requests or anything desiring some kind of action on the part of the customer. Indirect questions include phrases like "Can I?", "Could I", "Do you mind...", "Would it be okay if", "Would you mind if..." and "I was wondering if you could..."</p> </div> <div data-bbox="233 1024 875 1056"> <b>Description:</b> <p>Phrases that show polite language when making customer requests.</p> </div>                                                                                     |                     |                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Screen ID: Language | Screen: 9 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <div data-bbox="659 264 834 306">Search</div> <div data-bbox="846 264 940 306"></div> <div data-bbox="951 264 1029 306"></div> <div data-bbox="1040 264 1118 306"></div> <h1 data-bbox="248 321 878 380">Agreeing with Requests</h1>  <p data-bbox="280 659 634 690">When Agreeing to Requests:</p> <ul data-bbox="280 726 488 825" style="list-style-type: none"> <li>• Of course</li> <li>• Happy to help</li> <li>• My pleasure</li> </ul> <div data-bbox="951 825 1110 867">   </div> |                     |                 | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <p data-bbox="1138 296 1357 338"><b>Graphics:</b> Photo that shows positive c-sat employee/TO.</p> <p data-bbox="1138 359 1349 443"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1138 464 1341 548"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1133 621 1300 642"><b>Audio information</b></div> <p data-bbox="1138 674 1365 716"><b>Recording:</b> Will include polite phrases to show gratitude</p> |
| <p data-bbox="245 911 1382 953"><b>Transcript of audio:</b> Use direct language when you are agreeing to customer requests. Examples of these types of phrases include, "Of course" "Happy to help," and "My pleasure."</p> <p data-bbox="245 995 854 1016"><b>Description:</b> Phrases that show polite language when agreeing to requests.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                     |                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Screen ID: Language | Screen: 10 of 45                                                                                                                                                                                                                                                      | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <div>Search</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                     | <div>    </div> |                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <h1>Confirming Requests</h1>  <p>When Confirming Customer Requests:</p> <ul style="list-style-type: none"> <li>• Repeat customer order</li> <li>• Ask leading questions to help you better understand the customer's needs</li> </ul> <div>   </div> |                     |                                                                                                                                                                                                                                                                       | <div>Graphics info</div> <p><b>Graphics:</b> Photo that illustrates positive confirmation and customer service.</p> <p><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div>Audio information</div> <p><b>Recording:</b> Will include polite phrases to show gratitude</p> |
| <p><b>Transcript of audio:</b> So how do you respond to customer requests? Repeat the customer's order to ensure you don't miss anything. Some examples might be "May I confirm that you would like #333?" Ask leading questions to help you find out more information to gain a better understanding of the customer's needs.</p> <p><b>Description:</b> Phrases that show polite language when agreeing to requests.</p>                                                                                 |                     |                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                             |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |  | Screen ID: Language | Screen: 11 of 45                                                                             | Date: August 26, 2020                                                                                                                                                                        |
| <div>Search</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  |                     | <div></div> | <div></div> <div></div> |
| <h1>Declining Requests</h1> <div></div> <ul style="list-style-type: none"><li>• <b>Apologize to the customer</b></li><li>• <b>Negate the Request</b></li><li>• <b>Provide a Solution</b></li><li>• <b>Give Alternative Advice /Solution</b></li></ul> <div></div>                                                                                                                      |  |                     |                                                                                              |                                                                                                                                                                                              |
| <b>Graphics info</b> <p><b>Graphics:</b> Note that says "I'm sorry" shows remorse.</p> <p><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.'</p>                                                                                                                                                                                                                                                                                                                                  |  |                     |                                                                                              |                                                                                                                                                                                              |
| <b>Audio information</b> <p><b>Recording:</b> Will include polite phrases to decline customer request</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  |                     |                                                                                              |                                                                                                                                                                                              |
| <p><b>Transcript of audio:</b> When you are unable to take care of the customer's order, be sure to use these polite ways to decline the request. First, apologize that you are not able to fulfill the request. Next, provide the reason why you are unable to meet the request by saying something like, "It is not possible to order #333 because it is out of stock right now. Redirect the request by providing a solution. We do have #336 in stock, and it is very similar to the item you're requesting."</p> <p><b>Description:</b> Phrases that show how to politely decline requests from customers and suggest alternatives.</p> |  |                     |                                                                                              |                                                                                                                                                                                              |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Screen ID: Language | Screen: 12 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <div data-bbox="659 264 834 306">Search</div> <div data-bbox="846 264 940 306">i</div> <div data-bbox="951 264 1029 306">?</div> <div data-bbox="1040 264 1109 306">🏠</div> <h1 data-bbox="289 331 951 394">Accepting Responsibility</h1>  <ul data-bbox="289 674 743 831" style="list-style-type: none"> <li>• Apologize</li> <li>• Respond</li> <li>• Paraphrase the customer's problem</li> <li>• Give advice + time</li> </ul> <div data-bbox="951 821 1109 863">◀ ▶</div>                                                                                                                                                       |                     |                  | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <p data-bbox="1133 291 1365 333"><b>Graphics:</b> Note saying who is accountable</p> <p data-bbox="1133 354 1341 438"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1133 459 1333 543"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1133 621 1300 642"><b>Audio information</b></div> <p data-bbox="1133 674 1365 716"><b>Recording:</b> Will include polite phrases to show gratitude</p> |
| <div data-bbox="240 919 347 961"><b>Transcript of audio:</b></div> <p data-bbox="375 919 1317 1003">When you accept responsibility, you must again apologize and respond to the customer by paraphrasing the customer's problem (which provides for clarity around what the problem is and communicates that you are trying to understand their needs). Again, you should provide alternative solutions and give advice and request additional time. Say, "We can do this..." Empathize with the customer's situation by keeping your voice level and calm.</p> <div data-bbox="240 1024 347 1045"><b>Description:</b></div> <p data-bbox="375 1024 756 1045">Phrases that show polite you accept responsibility.</p> |                     |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |



# Phone-Based Customer Service Quiz



Click the button below to begin the quiz:

Start Quiz



## Graphics info

**Graphics:** Question mark post-it notes

**Navigation:** Backward arrows only on the bottom right side of the screen. Learner will click Start Quiz to begin the quiz.

**Add animation:** Fade in graphic and quiz start button at start of slide.

## Audio information

Recording on completing knowledge check quiz by sorting video on good and bad customer service examples.

**Transcript of audio:** When you start the quiz, you will answer multiple-choice questions that ask you to identify the best greeting. Click Start Quiz when you're ready to get started. Good Luck!

**Description:** Quiz Start Page

## Question 1



Identify the *best* example of a customer friendly greeting.

- ☐ PJ Enterprises, how can I help you?
- ☐ Hello, thank you for calling PJ Enterprises. My name is \_\_\_\_\_. May I ask who is calling?... How may I assist you?

Enabling Objective 1



### Graphics info

Graphics: Book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 1 Question 1

## Question 2



Identify the *best* example of customer friendly language for indirect "helpful" phrases.

- ☐ Mr. Smith, would you mind if I ask a question regarding your selection?
- ☐ Sir, what model is that?

Enabling Objective 1



Transcript of  
audio:

Description: Quiz 1 Question 2

### Graphics info

Graphics: Book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

### Question 3



Identify the *best* example of customer friendly language for a direct statement.

- ☐ Would it be okay if helped you with that?
- ☐ Of course, I am happy to help you with that!

Enabling Objective 1



#### Graphics info

Graphics: Book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

#### Audio information

Recording:

Transcript of audio:

Description: Quiz 1 Question 3

## Question 4



Identify the *best* example of using customer friendly language when declining a customer request.

- ☐ I'm sorry Mr. Smith, it is not possible at this time to order #333. However, we can offer a similar item!
- ☐ No, we can't do that.

Enabling Objective 1



### Graphics info

Graphics: Book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 1 Question 4



## Question 5



Identify the *best* example of using customer friendly language when accepting responsibility.

- ☐ I'm not sure why the order hasn't arrived; maybe it got lost in the mail.
- ☐ My sincerest apologies Mr. Smith. I'm not sure why your order has not arrived; May I look into it and see what I can find out?

Enabling Objective 1



### Graphics info

Graphics: Book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 1 Question 5

Project name: CBT Training for PJ Enterprises

Screen ID: Self reflection

Screen: 20 of 45

Date: August 26, 2020



Search



## Self-Reflection: Think About It

If a customer becomes abusive during a call, what actions should you take?



### Graphics info

Graphics: Man screaming

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:



**Transcript of audio:** If a customer becomes abusive during a call, what actions should you take?

**Description:** Connect ponder question

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                         |                  |                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Screen ID: Title Screen | Screen: 21 of 45 | Date: August 26, 2020                                                                                                                                                         |
| <div> <div>Search</div> <div>    </div> </div> <div> <h1>Customer-Friendly Intonation</h1>  <div>   </div> </div> |                         |                  | <b>Graphics info</b> <p><b>Graphics:</b> Pointing finger to icons</p> <p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                         |                  | <b>Audio information</b> <p>Recording:</p>                                                                                                                                    |
| <p><b>Transcript of audio:</b></p> <p><b>Description:</b> Title screen for ELO2</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                         |                  |                                                                                                                                                                               |

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|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Screen ID: Tone and Inflection | Screen: 22 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <div data-bbox="657 262 1109 310"> <input type="text" value="Search"/> <span>?</span> <span>?</span> <span>?</span> </div> <h1 data-bbox="240 317 915 365">Customer-Friendly Intonation</h1> <div data-bbox="284 386 626 634">  </div> <h2 data-bbox="284 657 539 684">What is intonation?</h2> <ul data-bbox="284 722 1091 840" style="list-style-type: none"> <li>• Intonation = up and down pitch</li> <li>• To <b>stress</b> something means to speak long, loud, higher and sometimes pause at the end of a sentence</li> </ul> <div data-bbox="951 825 1109 867"> <span>◀</span> <span>▶</span> </div>                            |                                |                  | <div data-bbox="1133 258 1382 737"> <p><b>Graphics info</b></p> <p><b>Graphics:</b> Show graphic that illustrates audio communication.</p> <p><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <p><b>Audio information</b></p> <p><b>Recording:</b> Will include polite phrases to decline customer request</p> </div> |
| <p><b>Transcript of audio:</b> Now that you've learned some basics of using friendly and welcoming language with customers, you'll learn that it's not always what you say, but how you say it that can also make a positive or negative first impression with customers. When you're carrying on a conversation in person, you have the benefit of being able to read someone's expression and body language to add additional meaning and context to what's being said. With a phone call, you lose this visual, so it's more important than ever that you use proper tone of voice or intonation when you're communicating with customers.</p> <p><b>Description:</b> Bullet points that show what Intonation is.</p> |                                |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

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|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Screen ID: Tone and Inflection | Screen: 23 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <div data-bbox="657 262 836 304">Search</div> <div data-bbox="844 262 938 304">i</div> <div data-bbox="946 262 1040 304">?</div> <div data-bbox="1049 262 1105 304">🏠</div> <h1 data-bbox="267 315 1047 420">How to Use Correct Tone to Greet Customers</h1>  <p data-bbox="279 688 649 724"><b>When greeting customers...</b></p> <ul data-bbox="279 745 852 840" style="list-style-type: none"> <li>• Emphasize/stress company name and your name</li> <li>• Agree to the customer's request</li> <li>• Take action</li> </ul> <div data-bbox="946 821 1105 863">◀ ▶</div>                                                                                                                                                                                                                                                                                                                                                           |                                |                  | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <p data-bbox="1133 289 1380 331"><b>Graphics:</b> Show graphic that illustrates audio communication.</p> <p data-bbox="1133 352 1372 415"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1133 436 1388 499"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.'</p> <div data-bbox="1133 621 1299 642"><b>Audio information</b></div> <p data-bbox="1133 663 1364 726"><b>Recording:</b> Will include polite phrases to decline customer request</p> |
| <div data-bbox="235 894 349 936"><b>Transcript of audio:</b></div> <p data-bbox="365 894 1396 1020">When greeting customers, use the same greeting you learned about earlier, but be sure to stress or emphasize the company name and your name. When making requests or asking customers to take a specific action, it's important that you place emphasis or stress on the possibility of the customer's assistance. For example: "Is it possible for you to," "Could you do..."? When you are agreeing to a customer's request, use phrases that show you agree such as "Of course, I would be happy to do that for you." To show you are taking action on the customer's request, use phrases such as "Yes, let me look that up for you." and "Great question; let me find that out for you right now!"</p> <div data-bbox="235 1056 337 1077"><b>Description:</b></div> <p data-bbox="354 1056 1136 1077">Bullet points that show how to use correct tone when greeting customers and communicating with them.</p> |                                |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Screen ID: Tone and Inflection | Screen: 24 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <div data-bbox="657 262 836 304">Search</div> <div data-bbox="844 262 941 304"></div> <div data-bbox="950 262 1047 304"></div> <div data-bbox="1047 262 1112 304"></div> <div data-bbox="261 342 717 399">Declining Requests</div> <div data-bbox="261 453 643 701">  </div> <div data-bbox="251 718 683 837"> <ul style="list-style-type: none"> <li>• Apologize to the customer</li> <li>• Negate the Request</li> <li>• Provide a Solution</li> <li>• Give Alternative Advice /Solution</li> </ul> </div> <div data-bbox="950 823 1112 865"> </div>                                                                                                                                                                                                                                                 |                                |                  | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <div data-bbox="1133 291 1365 336"> <b>Graphics:</b> Note that says "I'm sorry" shows remorse.         </div> <div data-bbox="1133 354 1370 417"> <b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)         </div> <div data-bbox="1133 436 1386 499"> <b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.'         </div> <div data-bbox="1133 621 1300 642"><b>Audio information</b></div> <div data-bbox="1133 669 1336 735"> <b>Recording:</b> Will include polite phrases to decline customer request         </div> |
| <div data-bbox="235 926 329 963"> <b>Transcript of audio:</b> </div> <div data-bbox="337 919 1377 1003">             When you are unable to take care of the customer's order, be sure to use these polite ways to decline the request using the appropriate tone of voice. First, apologize that you are not able to fulfill the request. Next, provide the reason why you are unable to meet the request by saying, "It is not possible <i>at this time</i> to order the item you requested because our manufacturer has delayed shipping right now. Redirect the request by providing a solution. "We can do this for you, however..."           </div> <div data-bbox="235 1047 329 1068"> <b>Description:</b> </div> <div data-bbox="337 1041 1039 1062">             Phrases that show how to politely decline requests from customers and suggest alternatives.           </div> |                                |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Screen ID: Tone and Inflection | Screen: 25 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <div data-bbox="657 262 836 304">Search</div> <div data-bbox="844 262 941 304"></div> <div data-bbox="950 262 1047 304"></div> <div data-bbox="1047 262 1144 304"></div> <h1 data-bbox="240 325 820 378">Accepting Responsibility</h1> <div data-bbox="259 403 643 651"></div> <ul data-bbox="251 667 682 819" style="list-style-type: none"> <li>• Apologize</li> <li>• Stress the word /</li> <li>• Stress the action you plan to take</li> </ul> <div data-bbox="950 823 1112 865"></div> |                                |                  | <div data-bbox="1133 258 1253 279"><b>Graphics info</b></div> <p data-bbox="1133 289 1310 310">Graphics: Man waving</p> <p data-bbox="1133 331 1372 394"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1133 415 1383 478"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1133 619 1300 640"><b>Audio information</b></div> <p data-bbox="1133 667 1364 709"><b>Recording:</b> will include polite phrases to show gratitude</p> |
| <p data-bbox="240 924 1388 987"><b>Transcript of audio:</b> Part of accepting responsibility is emphasizing the fact that you are sorry for what happened. Apologize to the customer by saying, "I'm sorry for your inconvenience. How can I help?" Again, you should provide alternative solutions and stress the actions you will take to help the customer resolve their issue/problem.</p> <p data-bbox="240 1024 734 1045"><b>Description:</b> Phrases that show polite you accept responsibility.</p>                                                                                                                                                                                                                                                                                                                                                                                                           |                                |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

Project name: CBT Training for PJ Enterprises

Screen ID: Quiz 2

Screen: 26 of 45

Date: August 26, 2020

Search



## Using a Customer-Friendly Tone Quiz



### Graphics info

**Graphics:** Question mark post it notes

**Navigation:** Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:



Transcript of audio:

Description: Title screen for quiz 2

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Screen ID: Quiz 2 start page | Screen: 27 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <div data-bbox="657 264 834 306">Search</div> <div data-bbox="846 264 938 306"></div> <div data-bbox="950 264 1026 306"></div> <div data-bbox="1037 264 1114 306"></div> <div data-bbox="240 327 597 373"> <h1>Intonation Quiz</h1> </div> <div data-bbox="618 380 980 606"></div> <div data-bbox="280 632 980 720"> <p>Now that you've learned how to use the appropriate tone of voice when answering the phone, you should be ready to take this brief knowledge check.</p> </div> <div data-bbox="280 745 662 777"> <p>Click the button below to begin:</p> </div> <div data-bbox="277 793 518 867"></div> <div data-bbox="950 821 1109 867"></div> |                              |                  | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <div data-bbox="1133 289 1338 331"> <p><b>Graphics:</b> Question mark post it notes</p> </div> <div data-bbox="1133 352 1369 457"> <p><b>Navigation:</b> Backward arrows only on the bottom right side of the screen. Learner will click Start Quiz to begin the quiz.</p> </div> <div data-bbox="1133 478 1373 562"> <p><b>Add animation:</b> Fade in graphic and quiz start button at start of slide.</p> </div> <div data-bbox="1133 621 1300 642"><b>Audio information</b></div> <div data-bbox="1133 674 1373 758"> <p><b>Recording:</b> On completing knowledge check quiz by sorting video on good and bad customer service examples.</p> </div> |
| <div data-bbox="253 940 1417 982"> <p><b>Transcript of audio:</b> When you start the quiz, you will answer multiple-choice questions that ask you to identify the best greeting. Click Start Quiz when you're ready to begin. Good Luck!</p> </div> <div data-bbox="253 1020 500 1041"> <p><b>Description:</b> Quiz Start Page</p> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                              |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |



## Question 1



**Background:** There are five recorded phrases; each phrase has two recorded examples. One recording uses stress and intonation correctly, and one recording uses stress and intonation incorrectly. Identify the phrase that correctly uses stress and intonation.

**Instructions:** Identify the phrase that correctly uses stress and intonation.

Sample MC Question (Phrase #1)



"Hello, thank you for calling PJ Enterprises, how may I assist you?" - said in flat, monotone tone of voice



Hello, thank you for calling PJ Enterprises, how may I assist you? - said with stress on Company Name and action



Hello, thank you for calling PJ Enterprises, how may I assist you? - said very quickly; no stress on Company Name or action

Enabling Objective 2



### Graphics info

**Graphics:** Book icon, audio icons

**Navigation:** Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 2 Question 1

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                  |                                                                                                                                                                                    |
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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Screen ID: Quiz 2 Question 2 | Screen: 29 of 45 | Date: August 26, 2020                                                                                                                                                              |
| <div> <div>Search</div> <div>    </div> </div> <h2>Question 2</h2> <div>  <p><b>Instructions:</b> Identify the phrase that correctly uses stress and intonation.</p> <p>Sample MC Question (Phrase #2)</p> <div>  <input type="radio"/> I'm sorry you are having difficulty with that item; let's see if I can help. - <i>said very quickly; no stress on "I."</i> </div> <div>  <input type="radio"/> I'm sorry you are having difficulty with that item; let's see if I can help! <i>Stress "I'm," and stress action (let's see if I can help)</i> </div> </div> <div> <div>Enabling Objective 2</div> <div>   </div> </div> |                              |                  | <p><b>Graphics info</b></p> <p><b>Graphics:</b> Book icon, audio icons</p> <p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                  | <p><b>Audio information</b></p> <p>Recording:</p>                                                                                                                                  |
| <p>Transcript of audio:</p> <p>Description: Quiz 2 Question 2</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                              |                  |                                                                                                                                                                                    |

## Question 3



**Instructions:** Identify the phrase that correctly uses stress and intonation.

### Sample MC Question (Phrase #2)



Great question. Let me find that out for you right now! *Intonation up on "Great question", and stress on action (Let me find that out for you right now!)*



Great question. Let me find that out for you right now! *Stress "Great, and "Now."*

Enabling Objective 2



### Graphics info

**Graphics:** Book icon, audio icons

**Navigation:** Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 2 Question 3

## Question 4



**Instructions:** Identify the phrase that correctly uses stress and intonation.

Sample MC Question (Phrase #2)



I apologize sir, I can assure you we here at PJ Enterprises are doing all we can to resolve this issue. Stress "I apologize sir, and "we are doing all we can to resolve this issue".



I can assure you we here at PJ Enterprises are doing all we can to resolve this issue, but my hands are tied right now. Stress "WE are doing all we can."

Enabling Objective 2



### Graphics info

Graphics: Book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 2 Question 4

## Question 5

Search



**Instructions:** Identify the phrase that correctly uses stress and intonation.

### Sample MC Question (Phrase #2)



I'm sorry for your inconvenience. How can I help? Stress "I'm sorry," and "How can I help?"



I'm sorry for your inconvenience. How can I help? Say in flat, monotone tone of voice.

Enabling Objective 2



### Graphics info

**Graphics:** Book icon, audio icons

**Navigation:** Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 2 Question 5



## Self-Reflection: Think About It



How could you ask questions to better understand the customer's needs, increase sales, and/or improve revenue?



### Graphics info

**Graphics:** Question mark post-it notes

**Navigation:** Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

**Recording:**

**Transcript of audio:** How could you ask questions to better understand the customer's needs, increase sales and/or improve revenue?

**Description:** Connect ponder question

Project name: CBT Training for PJ Enterprises

Screen ID: Title Screen

Screen: 34 of 45

Date: August 26, 2020

Search



## Strategies for Handling Interruptions & Distractions



### Graphics info

**Graphics:** 'Eliminate distractions' note card with coffee

**Navigation:** Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Title screen for ELO3

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                       |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Screen ID: Strategies | Screen: 35 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <div data-bbox="657 262 834 304">Search</div> <div data-bbox="846 262 938 304"></div> <div data-bbox="950 262 1026 304"></div> <div data-bbox="1037 262 1114 304"></div> <h1 data-bbox="240 346 1101 394">Internal Distractions You Can Control</h1> <div data-bbox="240 422 638 667"></div> <ul data-bbox="245 737 721 827" style="list-style-type: none"> <li>• Declining Requests</li> <li>• Accepting Responsibility/Apologizing</li> </ul> <div data-bbox="950 821 1114 863"></div> |                       |                  | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <p data-bbox="1133 289 1380 331">Image that shows frustrated TO or shows distractions.</p> <p data-bbox="1133 352 1372 415"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1133 436 1383 499"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1133 621 1300 642"><b>Audio information</b></div> <p data-bbox="1133 674 1354 737"><b>Recording:</b> ill include steps TO can take to mitigate distractions</p> |
| <div data-bbox="245 905 342 940"><b>Transcript of audio:</b></div> <p data-bbox="350 898 1388 982">There might also be distractions on your end when you answer the phone, such as when a customer calls and a coworker is on the other line talking loudly to another customer, making it difficult for you to hear. Actions you might take include offering your sincere apologies and explaining the situation. Always offer to help when you can and provide alternate solutions when no other options are available.</p> <div data-bbox="245 1031 337 1052"><b>Description:</b></div> <p data-bbox="350 1031 901 1052">Bullets that show you accept responsibility and politely decline requests.</p>                                                                                                                                                                                                        |                       |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                   |                  |                                                                                                                                                                                                                                                                                                                                                                                                  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Screen ID: Quiz 3 | Screen: 36 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                            |
| <div data-bbox="760 279 894 306">Search</div> <div data-bbox="902 279 976 310"></div> <div data-bbox="984 279 1040 310"></div> <div data-bbox="1049 279 1105 310"></div> <div data-bbox="344 380 945 434">Eliminating Distractions Quiz</div> <div data-bbox="464 506 732 768"></div> <div data-bbox="979 816 1036 848"></div> <div data-bbox="1044 816 1101 848"></div> |                   |                  | <div data-bbox="1133 262 1255 287"><b>Graphics info</b></div> <div data-bbox="1133 308 1344 352">Graphics: Question post-it notes</div> <div data-bbox="1133 373 1336 457">Navigation: Forward and backward arrows on the bottom right and left sides of the screen.</div> <div data-bbox="1133 619 1302 642"><b>Audio information</b></div> <div data-bbox="1138 672 1232 695">Recording:</div> |
| <div data-bbox="240 926 352 968">Transcript of audio:</div> <div data-bbox="240 1045 529 1071">Description: Title screen for quiz 3</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                   |                  |                                                                                                                                                                                                                                                                                                                                                                                                  |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Screen ID: Quiz 3 start page | Screen: 37 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <div data-bbox="657 262 836 304">Search</div> <div data-bbox="844 262 941 304"></div> <div data-bbox="950 262 1047 304"></div> <div data-bbox="1047 262 1144 304"></div> <h1 data-bbox="261 321 911 373">Eliminating Distraction Quiz</h1>  <p data-bbox="280 720 737 751">Click the button below to begin the quiz:</p> <div data-bbox="271 783 513 856">Start Quiz</div> <div data-bbox="950 821 1112 863"> </div> |                              |                  | <p><b>Graphics info</b></p> <p><b>Graphics:</b> Question mark post-it notes</p> <p><b>Navigation:</b> Backward arrows only on the bottom right side of the screen. Learner will click Start Quiz to begin the quiz.</p> <p><b>Add animation:</b><br/>Fade in graphic and quiz start button at start of slide.</p> <p><b>Audio information</b></p> <p><b>Recording:</b> On completing knowledge check quiz by sorting video on good and bad customer service examples.</p> |
| <p><b>Transcript of audio:</b> Now it's your chance to show your knowledge of how to react to and avoid letting distractions ruin your day. Click Start Quiz when you're ready to take this brief knowledge check. When you start the quiz, you will answer multiple-choice questions that ask you to identify the best greeting. Good Luck!</p> <p><b>Description:</b> Quiz Start Page</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                              |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

## Question 1



How should you respond to a customer calling about an item they ordered, but the article was never delivered?

- ☐ Tell the customer that you have no idea what happened to the order.
- ☐ Tell the customer to stop payment on the order.
- ☐ Offer your sincere apologies and explain that late deliveries can be a real pain.
- ☐ Tell the customer you will have to get your manager on the phone to help him/her.

Enabling Objective 3



### Graphics info

Graphics: book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 3 Questions 1

## Question 2



What should you do when an already irritated customer calls in and demands to speak to a manager immediately?

- ☐ Tell the customer that you have no idea what happened to the order.
- ☐ Empathize with their situation, keeping your voice level and calm.
- ☐ Hang up immediately.
- ☐ Put the customer on hold and wait for assistance.

Enabling Objective 3

### Graphics info

Graphics: book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 3 Questions 2



## Question 3



What do you do when a customer calls in and complains about an item they purchased from your catalog?

- ☐ Maintain a positive tone, and assure the customer it was not their fault the business could not meet their demand.
- ☐ Make no attempt to resolve the issue and transfer the call to the customer service supervisor.
- ☐ Hang up immediately.
- ☐ Tell the customer you have several other callers waiting and don't have time to take care of it.

Enabling Objective 3

### Graphics info

Graphics: book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 3 Questions 3

## Question 4



How should you respond when a customer calls and is dissatisfied with a product?

- ☐ Tell the customer "I am sorry to hear that! No problem. You can return it or exchange it for an upgrade."
- ☐ Tell the customer to "Yes, we get a lot of these back."
- ☐ Tell the customer, "I'm sorry, but you get what you pay for."
- ☐ Tell the customer "I am sorry to hear that, but we have another model."

Enabling Objective 3



### Graphics info

Graphics: book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of audio:

Description: Quiz 3 Questions 4

Search



## Question 5



How should you respond when you can't hear a customer properly due to a poor phone connection?

- ☐ Tell the customer, "This connection is horrible; give me your number, and I will try to get back to you."
- ☐ Tell the customer to "hang up and try calling back; maybe you will get a better connection next time."
- ☐ Tell the customer, "I'm sorry, sir. Due to the poor phone connection, I am having difficulty hearing you correctly. Would it be possible for me to get your name and a phone number to call you back in case we are disconnected?"
- ☐ Tell the customer "I am having phone difficulties. Can you please call back later?"

Enabling Objective 3



### Graphics info

Graphics: book icon

Navigation: Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:

Transcript of  
audio:

Description: Quiz 3 Questions 5

Project name: CBT Training for PJ Enterprises

Screen ID: Self reflection

Screen: 43 of 45

Date: August 26, 2020



## Self-Reflection: Think About It

Search



How will you tactfully handle a distraction from a customer (barking dog, etc.) and distractions in your own work area (such as loud conversation coming from the desk next to you)



### Graphics info

**Graphics:** Question mark post-it notes

**Navigation:** Forward and backward arrows on the bottom right and left sides of the screen.

### Audio information

Recording:



Transcript of audio:

Description: Connect Ponder Question

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                              |                  |                                                                                                                                                                                  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Screen ID: Conclusion Screen | Screen: 44 of 45 | Date: August 26, 2020                                                                                                                                                            |
| <div> <div>Search</div> <div>    </div> </div> <div> <div>Conclusion</div>  <div>   </div> </div> |                              |                  | <b>Graphics info</b> <p><b>Graphics:</b> Question mark post-it notes</p> <p><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                              |                  | <b>Audio information</b> <p>Recording:</p>                                                                                                                                       |
| <p>Transcript of audio:</p> <p>Description: Conclusion screen</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                              |                  |                                                                                                                                                                                  |

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| Project name: CBT Training for PJ Enterprises                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Screen ID: Summary Screen | Screen: 45 of 45 | Date: August 26, 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <div data-bbox="657 262 833 304">Search</div> <div data-bbox="846 262 940 304"></div> <div data-bbox="953 262 1021 304"></div> <div data-bbox="1034 262 1105 304"></div> <h1 data-bbox="248 302 511 348">Conclusion</h1>  <p data-bbox="245 640 940 669">After completing this module, you should now be able to:</p> <ul data-bbox="245 695 992 812" style="list-style-type: none"> <li>• Identify customer-friendly language.</li> <li>• Recognize appropriate versus inappropriate tone and inflection.</li> <li>• Identify strategies to eliminate most interruptions and distractions.</li> </ul> <div data-bbox="950 823 1109 865">   </div> |                           |                  | <div data-bbox="1133 258 1252 279"><b>Graphics info</b></div> <p data-bbox="1133 291 1380 333"><b>Graphics:</b> Image people waving good bye</p> <p data-bbox="1133 354 1370 417"><b>Add Animation:</b> Show image and fade in bullets timed with audio (<i>Use flow in animation</i>)</p> <p data-bbox="1133 438 1382 501"><b>Navigation:</b> Forward and backward arrows on the bottom right and left sides of the screen.</p> <div data-bbox="1133 621 1299 642"><b>Audio information</b></div> <p data-bbox="1143 674 1373 737"><b>Recording:</b> Will include steps to mitigate customer distractions.</p> |
| <p data-bbox="233 924 1373 987"><b>Transcript of audio:</b> Nice work! As a PJ Enterprises telephone operator, you've learned how to identify customer-friendly language. You've also found out how to recognize appropriate versus inappropriate tone and inflection when talking to customers. And finally, you've discovered strategies to help you eliminate most interruptions and distractions. You're now well on your way to becoming a customer service VIP!</p> <p data-bbox="233 1024 902 1045"><b>Description:</b> Show what the learner should now be able to do after completing this.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                           |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

# 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            | <b>Responding with customer-friendly language</b> / Trainees apply customer-friendly language through guided practice.                                                                 |
| Lesson 5            | <b>Responding with customer-friendly intonation</b> / Trainees apply customer-friendly intonation through guided practice.                                                             |
| Lesson 6            | <b>Responding to challenges with customer-friendly language and intonation</b> / 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.
- 

## **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:

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

| <b>Unit Progress:</b> 2 of 2                                                                                                                                                      | <b>Unit Title:</b><br>Telephone Etiquette                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <b>Lesson Number:</b> 4 of 6                                      | <b>Lesson Title:</b> Responding with customer-friendly language |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|-----------------------------------------------------------------|
| <b>Type:</b> Instructor-led Training                                                                                                                                              | <b>Enabling Objective:</b> Respond with customer-friendly language                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                   |                                                                 |
| <b>Trainee Audience:</b><br>Telephone Operator                                                                                                                                    | <b>Instructional Question:</b> How can I (trainee) recall and respond with customer-friendly language?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                   |                                                                 |
| <b>Facilitator/Trainer Role:</b> Facilitator                                                                                                                                      | <b>Lesson Focus:</b><br>Guided Practice                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Instructional Focus:</b> Skill<br><b>Secondary:</b> Knowledge  | <b>Time:</b> 60 minutes                                         |
| <b>Preparation:</b> 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                                                                                                                                                                             | <b>I. Prior-Knowledge Warm-Up</b><br>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.<br>Objective: Respond with customer-friendly language<br>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.<br>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:<br><b>Recalling Customer-friendly Language</b><br><b>Directions:</b> Stand up and take your marker. Look at the marker color. Go to the white board with your marker color.<br>D. Model the directions. Direct trainees to follow the directions. | B. 4 white board spaces                                           | B. 0                                                            |
| E. S2                                                                                                                                                                             | <b>I. Prior-Knowledge Warm-Up</b><br>E. Tell trainees to write what they remember about question 1.<br>Show question 1:<br>1. What is some language you can use for greetings and to close calls?                                                                                                                                                                                                                                                                                                                                                                                               | B. Lesson_4_Handout_1<br>C. Audio_TO2_ELO1A<br>E. Audio_TO2_ELO1A | C. 1                                                            |
| F. <click>                                                                                                                                                                        | F. Tell trainees to write what they remember about question 2.<br>Show question 2:<br>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.<br>Show question 3:<br>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                                                            |

|        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                                                   |
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| L. S3  | <p>Show question 4:<br/>4. What is some language you can use to decline requests?<br/>I. Tell trainees to write what they remember about question 5.<br/>Show question 5:<br/>5. What is some language you can use to accept responsibility?<br/>J. Confirm two correct responses from each group. Try to find different correct responses.<br/>K. Show the full list of responses for questions 1-5 to confirm correct answers.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | I. Audio_TO2_ELO1A                 |                                                                   |
| A. S4  | <p>L. Tell trainees that today we are going to practice these responses so that they become automatic when on customer calls.<br/>M. Tell trainees to sit in groups at workstations next to each other.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | K.<br>Lesson_4_Handout_1<br>side 2 |                                                                   |
| K. S5  | <p><b>II. Absorb Phase</b><br/>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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    | A. 5                                                              |
| L. S6  | <p>B. Pass out Lesson_4_Handout_1 side 1.<br/>C. Play audio.<br/>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.<br/>E. Play audio second time.<br/>F. Tell trainees to compare responses with trainees left and right of each other.<br/>G. Elicit responses from 4 different trainees. Make note of called on trainees.<br/>H. Tell trainees that they will listen again a third time.<br/>I. Elicit responses from 4 different trainees. Make note of called on trainees.<br/>J. Present responses on slide to confirm responses.<br/>K. Tell trainees to turn their Lesson_4_Handout_1 on the back. Tell trainees to reorganize their answers by selecting their 'favorites'.<br/>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.</p>                                                                            |                                    | C. 6                                                              |
| B. S8  | <p><b>III. Do Phase</b><br/>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.<br/>B. Present customer comment 1 on slide 8.<br/>1. "Can you offer full refunds on used products after 30 days?"<br/>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.'"<br/>D. Tell trainees that for each customer response, they will model it in a soft voice so that everyone can hear their own responses.<br/>E. Present customer comment 2.<br/>2. "Can you provide 2-day shipping?"<br/>F. Present customer comment 3.<br/>3. "Good morning."<br/>G. Present customer comment 4.<br/>4. "I just called 5 minutes ago, but the sound kept crackling."<br/>H. Present customer comment 5.</p> |                                    | E. 7<br>F. 8<br>G. 9<br>H. 10<br>I. 11<br>J. 12<br>L. 15<br>A. 16 |
| E. S9  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                                                   |
| F. S10 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                                                   |
| G. S11 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                                                   |
| H. S12 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                                                   |
| I. S13 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                                                   |
| K. S14 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | N.<br>Lesson_4_Handout_2           | E. 18                                                             |

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| M.<br>S15 | 5. "Yes, that is correct. I would like order number #54."<br>I. Present customer comment 6.<br>6. "I want to make two orders: the starlight candles and Aloe Vera skin lotion."<br>J. Confirm trainees' answers by showing the exemplars. Inform trainees that exemplars are not the only correct response.<br>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.<br>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.<br>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.<br>N. Pass out Lesson_4_Handout_2<br>O. Tell trainees to start.<br>P. Monitor trainees. Answer any questions.<br><b>III. Assessment Phase / Connect Component</b><br>A. Tell trainees to stop.<br>B. Tell trainees to calculate and deliver their scores to their partners.<br>C. Have trainees complete the goal sheet on Lesson_4_Handout_2.<br>D. Call on two different trainees to share 'what went well'. Board their responses right of Group Brown. Make note of called on trainees.<br>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.<br>F. Tell trainees that they will work on these goals in the next lesson about intonation. Answer any questions. | C.<br>Lesson_4_Handout_2 |       |
|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                          | J. 23 |
|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                          | K.19  |
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|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                          | C. 45 |
|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                          | D. 50 |

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| <b>Unit Progress:</b> 2 of 2                                                                                                                          | <b>Unit Title:</b><br>Telephone Etiquette                                                         | <b>Lesson</b><br>Number: 5 of 6                                  | <b>Lesson Title:</b> Responding with customer-friendly intonation |
| <b>Type:</b> Instructor-led Training                                                                                                                  | Enabling Objective: Respond with customer-friendly intonation                                     |                                                                  |                                                                   |
| <b>Trainee Audience:</b><br>Telephone Operator                                                                                                        | Instructional Question: How can I (trainee) recall and respond with customer-friendly intonation? |                                                                  |                                                                   |
| <b>Facilitator/Trainer Role:</b> Facilitator                                                                                                          | <b>Lesson Focus:</b><br>Guided Practice                                                           | <b>Instructional Focus:</b> Skill<br><b>Secondary:</b> Knowledge | <b>Time:</b> 60 minutes                                           |
| <b>Preparation:</b> 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#                                                                                                                                                | <b>Procedure</b>                                                                                  | Materials                                                        | Time (min)                                                        |

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| B. S1   | <b>I. Prior-Knowledge Warm-Up</b><br>A. Write the objective on the board:<br>Objective: Respond with customer-friendly intonation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | TLO2_ELO2_Pres.ppt<br>(whole lesson) | A. 0       |
|         | B. Present the objective and directions.<br><b>Recalling Customer-friendly Intonation</b><br><b>Directions:</b> Read each statement. Underline stressed language.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | C.<br>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.<br>C. Pass out Lesson_5_Handout_1 as trainees enter the classroom.<br>D. Confirm trainees' responses.<br>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       |
|         | <b>II. Absorb phase</b><br>A. Pass out trainees' completed copies Lesson_4_Handout_1.<br>B. Tell trainees to complete stress and pitch marks on Lesson_4_Handout_1.<br>C. Confirm trainees' responses.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | A.<br>Audio_TO2_ELO2A.mp3            | D. 10      |
| C. S3   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      | A. 11      |
| A. S4   | <b>III. Do phase</b><br>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.<br>We can offer store credit on used products."<br>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."<br>D. Tell trainees that for each customer response, they will model it in a soft voice so that everyone can hear their own responses.<br>E. Present customer comment 2.<br>2. "Of course, we can offer 2-day shipping. May I confirm that you would like to add 2-day shipping to this request?"<br>F. Present customer comment 3.<br>3. "Good morning. thank you for calling PJ Enterprises. My name is _____. May I ask who is calling?... How may I assist you?"<br>G. Present customer comment 4.<br>4. "I apologize. Can we call you back from a different line?"<br>H. Present customer comment 5.<br>5. "Great. You are ordering #333. Is there anything else I can help you with today?"<br>I. Present customer comment 6.<br>6. "Great! May I confirm your order of the starlight candles and Aloe Vera skin lotion?"<br>J. Present customer comment 7.<br>7. "I apologize. The date requested is not available. We can ship to you the next day on the 22 <sup>nd</sup> ."<br>K. Present customer comment 8.<br>8. "Yes, I can look that up for you right now. Your order will arrive on Tuesday the 6 <sup>th</sup> in the afternoon."<br>L. Present customer comment 9.<br>9. "I apologize. There seems to be an update issue. I am emailing you the revised order presently."<br>M. Present customer comment 10.<br>10. "Is there anything else I can help you with? Thank you for calling PJ Enterprises. Have a good day."<br>N. Confirm trainees' answers by showing exemplars for numbers 5-10. Read each exemplar aloud.<br>O. Tell trainees that they will now practice these customer-friendly |                                      | C. 13      |
| <click> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      | E-N. 14-23 |
| G.      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      |            |
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| H.      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      |            |
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| J.      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      |            |
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| K.      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      |            |
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| L.      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      |            |
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| M.      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      |            |
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| O. S6   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                      |            |
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| P. S7 | <p>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.</p> <p>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.</p> <p>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.</p> <p>N. Pass out Lesson_5_Handout_2</p> <p>O. Tell trainees to start.</p> <p>P. Monitor trainees' responses. Answer any questions.</p> <p><b>IV. Assessment Phase / Connect Component</b></p> <p>A. Tell trainees to stop.</p> <p>B. Tell trainees to calculate and deliver their scores to their partners.</p> <p>C. Have trainees complete the goal sheet on Lesson_5_Handout_2.</p> <p>D. Call on two different trainees to share 'what went well'. Board their responses. Make note of called on trainees.</p> <p>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.</p> <p>F. Tell trainees that they will work on these goals in the next lesson about challenges. Answer any questions.</p> | <p>N.<br/>Lesson_5_Handout_2</p> <p>C.<br/>Lesson_5_Handout_2</p> | <p>O. 26</p> <p>A. 45</p> <p>C. 50</p> <p>E. 55</p> |
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| <b>Unit Progress:</b> 2 of 2                                                                                                                | <b>Unit Title:</b><br>Telephone Etiquette                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Lesson</b><br>Number: 6 of 6                                  | <b>Lesson Title:</b> Responding to challenges with customer-friendly language and intonation      |                         |
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| <b>Type:</b> Instructor-led Training                                                                                                        | Enabling Objective: Respond to challenges with customer-friendly language and intonation during customer calls                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                  |                                                                                                   |                         |
| <b>Trainee Audience:</b><br>Telephone Operator                                                                                              | Instructional Question: How can I (trainee) recall and respond with customer-friendly language and intonation when encountering challenges during a call?                                                                                                                                                                                                                                                                                                                                                                              |                                                                  |                                                                                                   |                         |
| <b>Facilitator/Trainer Role:</b> Facilitator                                                                                                | <b>Lesson Focus:</b><br>Guided Practice                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>Instructional Focus:</b> Skill<br><b>Secondary:</b> Knowledge |                                                                                                   | <b>Time:</b> 60 minutes |
| <b>Preparation:</b> 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                                                                                                                                       | <b>I. Connect</b><br>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.<br>Objective: Respond to challenges with customer-friendly language and intonation<br>Group Black      Group Blue      Group Red      Group Brown      Goals<br><br>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)<br><br>B.<br>Lesson_6_Handout_1<br><br>C.<br>Audio_TO3_ELO1A.mp3 | A. 0<br><br>D. 1        |

|               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |                                                                  |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|------------------------------------------------------------------|
|               | <p>sure each you have left over twos or threes.</p> <p>C. Present the objective.</p> <p>D. Tell trainees that they will reflect on problems they've had with a customer.</p> <p>E. Present S1, which first shows the directions:</p> <p><b>Customer Challenges</b></p> <p><b>Directions:</b> Stand up and take your marker. Look at the marker color. Go to the white board with your marker color.</p> <p>F. Model the directions. Direct trainees to follow the directions.</p> <p>G. Tell trainees to write what they reflect about question 1. Show question 1:</p> <p>1. What challenges have felt you like you were able to solve EASILY?</p> <p>H. Tell trainees to write what they remember about question 2. Show question 2:</p> <p>2. What challenges have felt you like you were NOT able to solve?</p> <p>I. Tell trainees to write what they remember about question 3. Show question 3:</p> <p>3. What challenges have felt you like you were able to solve SOMETIMES?</p> <p>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.</p> <p>I. Tell trainees that today we are going to apply both customer service-friendly language and intonation when encountering challenges</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |                                                                  |
| G. S2         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  | F. 3                                                             |
| A. S3         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  | A. 10                                                            |
| B. S4         | <p><b>II. Absorb phase</b></p> <p>A. Tell trainees that they're going to listen to three audio conversations between telephone operators.</p> <p>B. Pass out Lesson_6_Handout_1 side 1. Direct trainees' to question 1.</p> <p>C. Play audio Audio_TO3_ELO1A.mp3</p> <p>D. Call on one trainee from each group for question 1. Make note of who was called on.</p> <p>E. Direct trainees to question 2.</p> <p>F. Play audio Audio_TO3_ELO1A.mp3</p> <p>G. Call on one trainee from each group for question 2. Make note of who was called on.</p> <p>H. Direct trainees to question 3.</p> <p>F. Play audio Audio_TO3_ELO1A.mp3</p> <p>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.</p> <p>I. Tell trainees to check their answers on Lesson_6_Handout_1 side 2. Direct trainees to fill in examples for each strategy.</p> <p><b>II. Do phase</b></p> <p>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.</p> <p>B. Present customer comment 1.</p> <p>1. "Why can't I have a refund after 30 days?"</p> <p>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.'"</p> <p>D. Tell trainees that for each customer response that they will model in a soft voice so that everyone can hear their own responses.</p> <p>E. Present customer comment 2.</p> |  | <p>A. 10</p> <p>C. 11</p> <p>I. 20</p> <p>A. 21</p> <p>I. 25</p> |
| D.<br><click> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |                                                                  |
| E.<br><click> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |                                                                  |
| F.<br><click> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |                                                                  |
| G.            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |                                                                  |

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|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|-----------------------------------------|
| <click><br>H.<br><click><br>I.<br><click> | 2. "Two-day shipping is three days late."<br>3. "Good morning."<br>G. Present customer comment 4.<br>4. "I just called 5 minutes ago, but the sound kept crackling."<br>H. Present customer comment 5.<br>5. "Yes, that is correct. I would like order number #54."<br>I. Present customer comment 6.<br>6. I want to make two orders: the starlight candles and Aloe Vera skin lotion.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Q. Pass out<br>Lesson_6_Handout_2 | P. 26                                   |
|                                           | N. S5<br>F. Present customer comment 3.<br>3. "I just was cut off five minutes ago."<br>G. Present customer comment 4.<br>4. "I just called 5 minutes ago, but the sound kept crackling."<br>H. Present customer comment 5.<br>5. "Order #333 is sold out!?"<br>I. Present customer comment 6.<br>6. "Your voice isn't clear."<br>N. Confirm trainees' answers by showing exemplars for numbers 1-6. Read each exemplar aloud.<br>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.<br>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.<br>Q. Pass out Lesson_6_Handout_2<br>R. Tell trainees to start.<br>S. Monitor trainees' responses. Answer any questions. |                                   | A. 40<br><br>C. 45<br>D. 55<br><br>F.00 |
| A. S6                                     | <p>IV. Assessment Phase</p> <p>A. Tell trainees to stop.</p> <p>B. Tell trainees to calculate and deliver their scores to their partners.</p> <p>C. Have trainees complete the goal sheet on Lesson_6_Handout_2.</p> <p>D. Call on two trainees to share 'what went well'. Board their responses. Make note of called on trainees.</p> <p>E. Call on two trainees to share 'what went well'. Board their responses.</p> <p>F. Tell trainees that they will work on these goals in Final Assessment.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                   |                                         |

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|-------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|---------------------------------------------------|
| <b>Unit Progress:</b> 2 of 2                                                                                                  | <b>Unit Title:</b> Telephone Etiquette Assessment                                                                                               | <b>Lesson Final Assessment</b>                                   | <b>Lesson Title:</b> Performance-based Assessment |
| <b>Type:</b> 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. |                                                                  |                                                   |
| <b>Trainee Audience:</b> Telephone Operator                                                                                   |                                                                                                                                                 |                                                                  |                                                   |
| <b>Facilitator/Trainer Role:</b> Administer                                                                                   | <b>Lesson Focus:</b> Assessment                                                                                                                 | <b>Instructional Focus:</b> Skill<br><b>Secondary:</b> Knowledge | <b>Time:</b> 60 minutes                           |
| <b>Description:</b> The assessment will be a performance-assessment. It extends the previous assessments in scope and length. |                                                                                                                                                 |                                                                  |                                                   |
| <b>Organization:</b><br><b>Grouping:</b> three                                                                                | <b>Interaction:</b><br><b>Customer:</b> Calls Telephone Operator using a prompt on the final assessment.                                        |                                                                  |                                                   |

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| 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                        |                                                                       |
| <b>Content Script</b>                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                        |                                                                       |
| 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.                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                        |                                                                       |
| <b>Evaluation</b>                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                        |                                                                       |
| 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; |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                        |                                                                       |
| <b>Facilities/Equipment</b>                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                        |                                                                       |
| 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.                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                        |                                                                       |
| <b>Preparation:</b> 18 copies of TO2_Assessment_1, 32 phones (internally or externally connected), speaker phone, pencils, scrap paper,                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                        |                                                                       |
| Slide#                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Materials              | Time (min)                                                            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <b>V. Final Assessment Phase</b><br>A. Write names of trainees on TO2_Assessment_1 to make final assessment groups.<br>B. Tell the trainees that they will complete a role-play with three roles: customer, telephone operator, evaluator.<br>C. Tell trainees that they will be using real phones and be separated for the assessment.<br>D. Pass out Lesson_6_Assessment_1.<br>E. Tell trainees to meet with each other and begin.<br>F. Tell trainees to stop.<br>G. Collect Lesson_6_Assessment_1 for scoring.<br>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.<br>TO2_Assessment_1 | A. 0<br><br><br><br><br><br><br>D. 6<br><br><br><br><br><br><br>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](https://www.nhi.fhwa.dot.gov/resources/ilt_instructor.aspx)*

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