Customer Service Training Ideas

Here are some practical customer service training ideas, exercises and activities that can help you address some of the key skills and attitudinal changes you may be seeking.

You may also like to review our tips on developing a customer service training programme to ensure you get the most from these training activities and exercises.

- **“Good and bad customer service experiences” exercise:**
  In a facilitated group session, split your staff into pairs or trios. The objective is to identify at least one example of when they have received excellent customer service. By contrast, then ask them to cite another example, of when they have received poor customer service:

  o When briefing the groups, ask the participants to think about what it was that specifically made them view the service as either excellent or poor. Give the groups ten minutes.
  o Whilst the group are coming up with their examples, write onto flipchart. Use a heading of ‘Poor Service’ and ‘Excellent Service’, with a line down the centre of the flipchart.
  o After ten minutes, ask the small groups to return to the whole group to share their examples. Each group should then share their customer service examples. In addition, write down the specific factor that each group identifies as being the main reason for their experience of excellent or poor customer service.
  o Now share some or all of these experiences. Ask the group to review the flipchart and ask them what common themes are coming through from their service experiences.
  o A key part of the customer experience is down to the helpfulness and responsiveness of the person communicating with you. As a result, you can ‘draw out’ the definition of customer service, which is all about how you respond to the customer. For example, ‘The feeling, good or bad, that a customer has when they are with YOU’.

- **“Stepping into the shoes of your customers” exercise:**
  Ask your staff to identify their key groups of customers and then to ‘step into the shoes’ of their customers. Get them to think about a specific customer, to establish what their needs are at every stage of the process. This will be from making initial contact with you, through to the service or product they buy from you, as well as the final departure and after-sales service.

  o Capture the learning and the suggestions for change to pass these on to your management team for potential implementation. In addition, ask the staff to identify ways that they can demonstrate ‘going the extra mile’ to help the customer. This will help them commit to a personal change from this exercise.
• **Experience your service as a customer:**
  Consider getting representatives of your staff to fully utilise your services, or to purchase one of your products. Debrief their experience. What worked well, what could have been better? In addition, get them to think about what they can do to apply these insights into their particular role. The objective is to improve the element of the service or product they deliver.

• **View competitor customer service:**
  Run some practical activities that get your staff telephoning a competitor to make an enquiry, purchase a small item, or utilise their service. This type of activity usually helps people to critique customer service from a non-threatening perspective. As a result, this enables them to consider what they could do better within their own organisation. This type of activity can help to change perceptions and mindsets.

• **Provide communication skills training:**
  Good communication skills are essential in customer service. As a result, this training should cover:
  
  o Enquiry handling
  o Face to face customer greeting
  o Explaining your services
  o Establishing customer needs, through questioning and listening skills
  o How to embed customer service standards at each stage of the process

  In addition, here are some further tips to consider:
  
  o If you do not have some basic pre-agreed customer service standards, then get your staff involved during the training. Suggest what the standards should be e.g. answering a telephone call within three rings.
  o Give the staff some practical scenarios of using these communication skills, so that they discuss how they would handle them. In addition, get them to practice these scenarios to build their skills and confidence.
  o Encourage them to support one another and give each other some constructive and motivational feedback.

  See our [communications skills training](https://www.ksl-training.co.uk), if you need help.
• **Dealing with difficult situations and complaint handling:**
  Many staff find dealing with difficult situations and customer complaints quite challenging. See our tips on dealing with difficult behaviour and complaint handling for help.

  o Run a short training session with some tips to help them. In addition, include an opportunity to share best practice. This will build their confidence in dealing with these situations.

  o Also, consider a practical demonstration of how not to respond to the customer complaint or concern, followed by a good example. This can help you draw out the techniques. Then give staff the time to practice these situations themselves, in small groups, so that they feel supported.

• **Develop product knowledge:**
  Basic knowledge should be covered in the staff member’s induction – see our Staff Induction Checklist for further support.

  However, to keep your staff up to date with changing products and services, try introducing simple quizzes, product tests, team briefings.

  In addition, consider arranging visits to other departments throughout the staff member’s time with you. As a result, your staff will be able to confidently explaining these products and services to your customers, as well as their team colleagues, on their return to their department.

• **Suggestions for improving customer service:**
  Introduce a simple method for staff suggestions for helping the organisation improve customer service, remembering to feedback a constructive response to the idea. For example:

  o A simple suggestion box
  o Intranet posts
  o Setting a section of the monthly team meeting for continuous improvement
  o Employee survey with section for making suggestions
  o Part of the performance appraisal
  o Customer service or ‘values’ forums/working groups
  o Competition for best idea
• **Internal customer service improvements:**
  Ask each manager/head of function to facilitate a meeting, that champions their team.
  Consider ways that we can improve our internal service to others. In addition, focus on how
to achieve enhanced customer service.

  Also, consider ways we would value help from our internal customers to help us improve
customer service.

  - Bring the captured insights to a senior managers meeting to identify the best way
    forward. A number of items may generate process improvements within each
    function. Others may help to identify the next piece of customer service training.

• **Ensure a customer service focus within staff induction:**
  Having provided customer service training to your current staff, review the induction
  programme that all your staff receive. In particular, ensure that new staff receives similar or
  abbreviated customer service training.

  See our [staff induction programme](https://www.ksl-training.co.uk) and [staff induction checklist](https://www.ksl-training.co.uk) for further assistance in this
  area.

**Related Topics**

You may also find our tips helpful on:

- [Dealing with Difficult Behaviour](https://www.ksl-training.co.uk)
- [Developing a Customer Service Training Programme](https://www.ksl-training.co.uk)
- [Tips on Facilitating Groups](https://www.ksl-training.co.uk)

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