Customer Service Training Ideas

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

Most of these suggested exercises are based on you bringing your team together. The resulting team experience can be highly valuable in generating new or different approaches to customer service, both for internal and external customers. Training the team in this way usually has a very positive impact on morale, as well as improving customer service orientated behaviours.

You may like to start by reading our tips on developing a customer service training programme, to ensure you get the most from your training activities and exercises. These customer service training ideas are designed to enhance team members Attitudes, Skills and Knowledge.

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1. “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. Then ask them to cite another example, of when they have received poor customer service:

- Ask the participants to really think about what it was that specifically made them view the service as either excellent or poor. Give the groups ten minutes.

- Then get the small groups to return to the whole group to share their customer service examples. Write these examples onto a flipchart under the headings ‘Excellent Service’ and ‘Poor Service’.

- Most importantly, write down the specific factor that each group identifies as being the main reason for their experience of poor or excellent customer service.

- Ask the group to review the flipchart and ask them what common themes are coming through from their service experiences.

- 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’.

2. “Stepping into the shoes of your customers” exercise

Ask your staff to identify their key groups of customers and note these down onto flipchart. Then break the group into pairs or trios and assign one customer group to each staff group. Give each group ten to fifteen minutes to 'step into the shoes' of their assigned customer group:

- Establish what their needs are at every stage of the customer service journey. 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. It could also include the ways you keep in touch with them.

- Ask them to identify how well we currently meet the needs of this customer group.
  - What should we stop doing?
  - What should we continue doing?
  - Is there anything we should start doing?

- Capture the learning and the suggestions for change. Then pass these on to your management team for potential implementation.

- Ask the staff to identify at least one action point that they can immediately implement from this session. Hence they will be committing to a personal change from this exercise. Their manager can then follow this up in their one to one review.

3. “Experience your service as a customer” exercise

This exercise gets representatives of your staff to fully utilise your own services, or to purchase one of your key products or range of products. As a result, staff members see their service from a very different perspective. It can also encourage them to develop a different attitude towards your customers in the future.

- Consider your range of products and services to identify where you excel and where you could potentially most improve your customer service.

- Provide staff members with a brief on a specific product or service to review. Remind them of the importance and value of the exercise – it’s a great opportunity to learn and see things differently from a customer perspective.

- Review their experience either individually or in a group activity.
  - What worked particularly well?
- How could it have been better?
- What could we do to enhance the product or service?
- Who else needs to be involved?

Then get the whole group to review these responses. Identify what activity would have the greatest impact on your overall customer service. As a result, staff members will be able to prioritise their next steps following this group session.

In addition, get the staff members 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 in a focused way that enhances your overall customer service.

Need help? Take a look at our customer service training.

4. “Evaluate competitor customer service” exercise

Run some practical activities that get your staff members contacting a few competitors to:

- make an enquiry about a product or their services
- purchase a small item or utilise their service
- return a purchased item

4.1 Briefing staff members

Ask staff to utilise the different communication methods offered by the competitor. For example, by telephone, email, or by completing an enquiry form.

Get them to make a note of the responses they get to their enquiry. Then rate how the customer service team member came across whilst serving them. Hand them a form like the one below to ensure consistency of feedback.

4.2 Competitor Customer Service Feedback Form
<table>
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<th>Competitor name:</th>
<th>Date:</th>
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<table>
<thead>
<tr>
<th>Competitor customer service experience</th>
<th>Scale 1 to 5</th>
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<tbody>
<tr>
<td>Rating scale: 1 poor, 2 some cause for concern, 3 acceptable, 4 very good, 5 exceptional</td>
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How well did the customer service agent:

- Greet you?
- Ask questions to find out your needs?
- Explain their product or service?
- Answer your questions?
- Provide you with a suitable product or service for your needs?
- Resolve any issues or concerns that arose?

How would you rate your overall customer service experience as engaging and effortless?

Reflections:

- What would have made your rating higher?
- What aspect of the customer service could you apply to our customer service?

4.3 Reviewing competitor service
This type of activity usually helps people to critique customer service and consider what good customer service really looks and feels like. Finally, ask the staff members to reflect on how they would rate their own service. What could be done to make the service better within their own organisation?

This process can also help to change team member perceptions and mindsets. Hence it can be particularly useful when you are trying to raise your customer service to a higher level. For example, where a hotel wishes to enhance service from three star to four, or even five stars. Alternatively, you may just want to increase your standards to beat other competitors in your marketplace.

5. Defining your customer service framework

Building on the first four exercises above, run a facilitated exercise with your team to help define your future customer service framework. Start the exercise by introducing a visual with three E’s on a flipchart, slide or whiteboard.

Explain that you can also build on the customer service definition using the 3 E’s model:

- **Easy** fast response to service requests
- **Engaging** personalised to individual needs
- **Effortless** answering questions and issues before they arise or escalate

Ask the group to come up with ways that our service responds to the 3 E’s; perhaps in pairs. In addition, can get them to write these examples down on Post-It Notes (one example per note). They can then bring these Post-It Notes up onto the whiteboard or flipchart and place them by the relevant E.

Bring the whole group together to stand around your whiteboard or flipchart, and ask each set of pairs to expand on the examples given where needed.
Finally, as the group to identify ways that they could build or adapt their customer service to make it more Easy, Engaging or Effortless. Then get them to agree an action plan of how these ideas are taken forward and implemented.

6. Setting customer service standards

If you do not have some basic pre-agreed customer service standards, then get your staff involved in setting these standards during the customer service training. This will empower your team, as they will need to agree and commit to achievable standards to consistently implement after the training. When setting customer service standards, consider:

- What type of language should be used? Consider formal versus informal style of language. For example, what type of tone best represents your values and service ethics? Also, what specific words to use in critical situations.

- How messages are given? Do you want a friendly, upbeat message or a professional, considered voice tone? For example, you might agree on the best ‘verbal handshake’ or phrase to use to greet customers face to face, by telephone or in writing. Do you use ‘Hi’ or ‘Dear’ for example.

- When service should be delivered in a realistic timescale. For example, the telephone should be answered within three rings.

- What support processes are needed to ensure the consistent delivery of these standards? For example, customer communication templates.

7. Communication skills training exercises

Our customer service training ideas wouldn't be complete without considering ways to improve verbal communication. This is because good
communication skills are essential in customer service. In particular, a balance of engaging, friendly, helpful and assertive communication techniques are usually needed in service roles.

Team members are usually recruited based on their highly responsive, service orientated behavioural traits. These traits are perfect for most customer interactions. However, when customers behaviour becomes aggressive or confrontational, an increased level of assertiveness is needed. Assertiveness helps to control these conversations and to quickly reach a satisfactory resolution.

7.1 Key communication skills for customer service roles

Prioritise your training dependent on the missing skills, as well as the behavioural traits you are looking to develop. These are the key skill areas normally covered within customer service training:

- Greeting the customer, ‘verbal handshake’ and tone of voice
- Building rapport as well as adapting to different customer personalities
- Asking open probing questions to establish customer needs
- Reflective listening
- Explaining your products and services (see point 10)
- Answering customer questions (also see point 10)
- Using responsive and assertive language
- Escalating customer queries and service requirements
- Working with internal customers to achieve customer needs
- Dealing with difficult situations and complaint handling (see point 8)

7.2 How to deliver communication skills training
To deliver effective communication skills training requires great planning and structure. You’ll also need to harness your own communication skills to really engage and teach these skills. Here are some ideas of how to approach the training.

Start with a practical demonstration of how not to greet and build rapport a customer, followed by a good example. You can then draw out the best ways and techniques for greeting and building rapport with customers. Finally, capture the key points from the staff members on flipchart to refer back to at any stage during and after the training sessions. Write your flipchart headings "Do's" and "Don'ts".

Allow time in the training for discussing and practising these communication techniques within typical customer conversations. Break the staff members into small groups of between two to four participants and allow them some space to work privately. The discussion should also include a recommended way of responding to the customer scenario presented. Allow team members time to share their previous experience and build best practice together. In addition, get them to practice these scenarios to build their skills and confidence in handling these situations.

7.3 Communication skills practice sessions

Encourage staff members to support one another during the short practice sessions, of say ten minutes each. Then allow some additional time of around five minutes to give each other some constructive and motivational feedback. For example, ask:

- What one thing did they do really well?
- What one thing could they do differently next time?

Once these practice sessions have taken place, bring the whole group back together to share their learning. Ask the group what we can take away and apply back in the workplace from these practice sessions?

In addition, what further support or resources are needed to deliver this customer service on a consistent basis?
8. Dealing with difficult situations and complaint handling

Many staff find dealing with difficult situations and customer complaints quite challenging. This is especially true where staff members are less assertive or struggle with the positive assertive language and mindset needed to appease the customer emotions at this time.

8.1 Key complaint handling skills for customer service roles

Strong complaint handling skills are essential in customer service. Hence, a balance of empathy, factual and assertive communication techniques are usually needed. Consequently, this training should cover key skill areas such as:

- Structuring customer complaint conversations
- Demonstrating empathy with customers
- Using positive assertive language as well as mindset
- Saying ‘no’ supportively
- Positioning customer solution to the complaint
- Overcoming customer objections
- Responding to aggressive and passive behaviour
- Escalating customer complaints to the next level
- Working with internal customers to resolve customer complaint

8.2 Complaint handling training

Firstly, run a series of short training sessions with your staff members covering the basic principles of handling complaints effectively. Include what the team already know or do well.

Start these sessions with some statistics about your current customer complaint levels. Also include what customers complain about most often.
Staff members will then see why the training is so important.

8.2.1 Complaint training aim and objectives

Introduce the session by saying that during these training sessions there will be an opportunity to share tips, as well as current experience and agree best practice for our business.

Start these sessions with some statistics about your current customer complaint levels and what customers complain about most often. As a result, staff members will understand why the training is so important.

Whilst doing this, it’s vital the team member don’t feel deflated by the results. Most importantly, they must feel as though this training, as well as their current knowledge and support, can help resolve and prevent customer complaints in the future.

You can also run short simple exercises that get the team members considering the key issues. For example:

- **Benefits of Customer Complaints** – what are the benefits of customer complaints to
  - the organisation?
  - the department?
  - you?

- **Impact of Customer Complaints** – what impact do customer complaints have on:
  - the organisation as a whole?
  - your department?
  - you?

Whichever exercise you run, it’s important that this exercise sets the focus and tone for the main part of the training session. For example:

- the Impact exercise will help you draw out the cost, time, resources and negative publicity that complaints bring, whilst...
- the Benefits exercise enables you to draw out the great opportunity to turn the customer experience around. As a result, you could win a customer for life, improve customer service and prevent future complaints
8.2.2 The do’s and don’ts of complaint handling

Firstly, start with a practical demonstration of how not to respond to the customer complaint or concern, followed by a good example. You can then draw out the best ways and techniques for handling a customer complaint. You can capture the key points from the staff members on flipchart to refer back to at any stage during and after the training sessions. Write your flipchart headings ‘Do's’ and ‘Don’ts’.

8.2.3 The impact of assertive behaviour

Another practical activity to demonstrate the importance of behaving assertively and the importance of our non-verbal actions, such as tone of voice and upright body language, is to run a short demonstration on asking to borrow a team member's pen using different types of behaviours:

- **Passive behaviour** where you ask the team member 'can I borrow your pen' with slumped shoulders, looking nervously down at them, quietly and slowly.

- **Aggressive behaviour** where you ask the team member 'can I borrow your pen' with stiff upright shoulders, looking sternly down at them, quickly and loudly.

- **Assertive behaviour** where you ask the team member 'can I borrow your pen' with upright behaviour, looking directly at the team member in a non-threatening way (perhaps with a smile), in an even, moderate tone.

- Be sure to use the identical words in all three short demonstrations. Finally, turn to the group and ask them what did they notice? Which example worked best? Why was that?

- Explore with the team member involved how each behaviour felt to them, being on the receiving end.
- Summarise the conversation by sharing that our goal in customer communications is always to be assertive.

- In conclusion, assertive communication respects the other person and their views, whilst accommodating their needs and yours.

8.2.4 Handling customer complaints exercise

Give staff the time to discuss one to three pre-prepared different customer complaint scenarios getting each small group the opportunity to consider:

- How might the customer be feeling in this situation?
- What considerations do we need to make for the customer, our colleagues and the future of our business?
- Who else may we need to refer to?
- What would you say to the customer and what action would you take?
- How could we prevent this situation from arising again?

Once the small groups have had time to discuss these scenarios, bring them back together as one group. Get them to share the customer complaint scenario, as well as their responses to these questions.

Now give the staff members the opportunity to practice one or more of these situations themselves, in pairs or trios, so that they feel supported.

For example, they could practice one scenario each with a colleague taking the role of the customer and one as a neutral observer. After each session, allow additional time for some feedback as well as changing roles, so everyone gets the opportunity to practice.

Finally, during a feedback session of about five minutes, encourage the observer to give some constructive and motivational feedback. For example, ask:

- What one thing did they do really well?
- How successful was the outcome of the complaint conversation?
- What one thing could they do differently next time?
9. ‘Attitude Anchors’ to maintain positivity

Working on the frontline with your customers on a regular basis can be both emotionally rewarding and draining, dependent upon the nature of the customer interactions.

In these situations, identifying staff member's "attitude anchors" can really help maintain their positive attitude. These are things that help maintain staff positivity, which they can pull on at a time when they've experienced some challenging situations. Hence they can have a really positive impact.

9.1 Attitude Anchor exercises

During your next training session, introduce the concept and benefits of having these attitude anchors and get them to undertake one or more of the following activities:

- Note down three moments of happiness or success that made you feel really good. For example, when a customer or a colleague gave you some really positive feedback for helping to resolve a difficult situation.

- Run a group exercise called ‘Gifts’ where you get each team member to write their name at the top of a sheet of flipchart or A4 paper and place this on the floor behind them (ideally in a circle).

- Then ask each team member to move to their right and write one ‘gift’ or strength that they think that team member brings to the team, particularly in terms of customer service.

- Keep the exercise going until each staff member has written one ‘gift’ for each person. Then allow each team member the opportunity to read their ‘gifts’.

See tips on dealing with difficult behaviour and complaint handling.
Both exercises can be really heart-warming for each team member. Encourage them to fold and retain their list on them so they can pull these out at a time of great need. For example, just after handling a difficult customer situation.

These exercises can be adapted so that instead of writing the team member’s ‘gifts’ or ‘moments’ by drawing them or using magazine cut outs. You can also run these exercises on an electrical device as a more sustainable solution.

10. Develop product knowledge exercise

Product knowledge is normally developed through the staff member’s induction into their own area of work first, followed by more company-wide products.

See our staff induction checklist for further support.

Once the Induction has been completed, keep your staff up to date with changing products and services. Try some of these ideas to keep product knowledge training engaging for your team members:

- Introduce product tests (particularly nice if food products 😊)
- Hold team briefings. Invite the specialist responsible for the product introduction to explain the features and benefits of the new product or service
- Run quizzes to test team members’ product knowledge
- Consider arranging visits and job shadows to other departments. As a result, staff members will become familiar with a wide range of your products and services
- Rotate staff member visits and get them to share what they have learnt about the products and services
- Develop a FAQ (frequently asked questions reference guide) for easy reference and add to, when new customer questions arise.
- Share recent customer feedback, compliments and complaints with the team to share learning as well as any product knowledge gaps.
- Add a short product knowledge agenda item to your team meetings as a reminder to share new or missing product knowledge. Encourage the team members to input into this agenda item too.
As a result, your staff will be able to confidently explain these products and services to your customers. This will also benefit their team colleagues who indirectly support them in providing great customer service.

11. Suggestions for improving customer service

Introduce a simple method for staff suggestions to help the organisation improve customer service, remembering to feedback a constructive response to the idea. For example, you can provide one or more of the following:

- A simple suggestion box
- Email ideas to a central point
- Set aside a section of the monthly team meeting for continuous improvement
- Include a suggestion section in the employee survey
- Ask for ideas as part of the performance appraisal
- Hold customer service or ‘values’ forums/working groups
- Competition for best idea

The more staff members can see their suggestions and ideas being taken on-board and implemented, the more frequently new ideas will be made. This will increase the commitment of staff members to the business and improve customer care.

12. Internal customer service improvements

First of all, facilitate a meeting that champions the team to come up with some collective improvements to customer service. Give the staff members time to consider the following questions prior to the meeting:

- How can we enhance our customer service?
- Do they have ideas to improve our internal service to others?
- How can our internal customers help us improve customer service?
12.1 Generating ideas

Remind the team before you start to hear their suggestions:

- We are looking for as many customer service improvement ideas as possible
- No idea is a bad idea. It may be the spark of an idea that gets built on that becomes a real gem
- No-one should comment on the idea mentioned initially. There will be time after we’ve captured the ideas onto flipchart or a whiteboard
- Feel free to move around to keep your energy, as well as the ideas flowing
- Let’s remove any potential interruptions (phones off, noise distractions etc)

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.

12.2 What to do when ideas dry up

If team members ideas dry up, one way is to reverse this technique by asking:

- How can we make our customer service worse?
- Can you think of ways to reduce our internal service to others?
- How can our internal customers hinder our customer service?

Once you have your list you then ‘flip’ each idea to turn it into a positive. For example, if you wanted to make customer communication worse, you may say ‘only communicate by email’.

You’d then flip this to say ‘only use email when absolutely essential, such as confirming contractual terms with the client. Most customer interactions would then be by telephone, face to face or virtual meetings.
13. Customer service focus within staff induction

Having provided customer service training to your current staff, consider how you can maintain this level of training is continued with your new team members.

- Review the induction programme that all your staff receive. In particular, ensure that new staff receive similar or abbreviated customer service training.

- Identify a few team members who have become really great Customer Service Ambassadors for the business. These are team members who always go the extra mile for your customers, receive great feedback from customers and are good communicators.

- Train or coach your Customer Service Ambassadors so they can become great Induction Buddies/Coaches for your new team members. As a result, they can train new team members in the key elements of your customer service delivery. Typically, they will also become a listening, supportive colleague that the new team member goes to for advice and support during their few months, rather than keep asking their manager questions.

See [staff induction programme](#) and [staff induction checklist](#) for help.

About the author

**Kim Larkins**, MCIPD is Company Founder of KSL Training. Kim has 30 years training and HR management experience in the Retail, Hospitality and Pharmaceutical industry.

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