Building Strong Client Relationships (Facilitator Guide)

Producer: Pre-work	Coordinate with the facilitator: Communicate with the facilitator to understand their expectations, preferred delivery style, and any specific requirements. Collaborate on the training flow and timing to ensure a seamless transition between sections. **(Review Slides 1-39)**
	Review the training outline: Familiarize yourself with the training outline and objectives. Understand the purpose of each section, the desired outcomes, and the activities involved. This will help you effectively support the facilitator during the session. **(Review Slides 2, 5, 8, 11, 20, and 24)**
	Review the presentation slides: Work with the facilitator to review the presentation slides. Ensure that the content is visually appealing, well-structured, and supports the key messages. Coordinate with the facilitator to incorporate any necessary multimedia elements. **(Review Slides 1-39)**
	Gather and organize resources: Collect any additional resources, references, or handouts that will be shared with participants during or after the training. Organize them in a format that can be easily accessed and shared during the session. **(Review Slides 6- 7, 10, 17-19, 23, 29-31, and 37-39)**
	Familiarize yourself with the virtual platform: Become proficient with the virtual platform being used. Test the features and functionalities, including screen sharing, chat, breakout rooms, and participant management. Ensure that you are comfortable operating the platform and troubleshoot any potential issues in advance. **(Review these features in the Zoom virtual platform)**
	Prepare for the ice breaker activity: Understand the instructions and purpose of the ice breaker activity. Coordinate with the facilitator on how it will be conducted, whether through chat, participant sharing, or other means. Prepare any necessary prompts or questions to facilitate the activity smoothly. **(Review Slides 6 and 7)**
	Coordinate breakout room activities: Work with the facilitator to understand the instructions and objectives of the breakout room activities. Prepare clear guidelines and directions that can be easily shared with participants. Assign facilitators for each breakout room and communicate their roles and responsibilities. **(Review Slides 17-19 and 29-31)**
	Manage technical aspects: Ensure that all technical equipment, such as microphones, cameras, and lighting, are in working order. Test the audio and video quality to ensure clear communication. Coordinate with the facilitator to address any technical requirements they may have during the training. **(Review these features in the Zoom virtual platform)**

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	Develop a contingency plan: Identify potential technical or logistical issues that may arise during the training. Prepare a contingency plan to address these issues promptly and minimize disruptions. Coordinate with the facilitator on how to handle unforeseen circumstances effectively. **(Review Slides 1-39)**
	Coordinate with the facilitator on participant engagement: Discuss strategies for encouraging participant engagement throughout the training. Coordinate on when and how to incorporate engagement questions, polls, or interactive activities. Prepare any necessary materials or instructions for these activities. **(Review Slides 6-7, 10, 17-19, 23, 29-31, 34-35, and 39)**
	Prepare for the Q&A session: Work with the facilitator to anticipate potential questions from participants. Prepare a list of common questions and their answers to assist the facilitator during the Q&A session. Ensure that you are familiar with the content and can provide support when needed. **(Review Slide 35)**
	Complete the closing slides: Add contact information for the facilitator and producer. Add any additional resources, references, or recommended readings for participants to explore further. Coordinate with the facilitator to ensure the slide aligns with the overall training theme. **(Review Slides 37 and 38)**

Facilitator Pre-Work:	Familiarize yourself with the training outline, objectives, and key points. Take the time to comprehend the importance of building strong client relationships and the techniques associated with it. **(Review Slides 2, 5, and 33)**
	Review the slides and materials: Go through the slides and any supporting materials provided. Ensure that you understand the flow of the presentation and the key messages to be delivered. **(Review Slides 1-39)**
	Practice your delivery: Rehearse your presentation to become comfortable with the content and timing. Pay attention to your tone of voice, pace, and body language. Practice transitioning smoothly between sections. **(Review Slides 1-39)**
	Review speaking notes: Review peaking notes or a script that outlines the key points and talking points for each slide. This will help you stay organized and ensure that you cover all the necessary information. **(Review Slides 1-39)**
	Review engaging questions: Identify strategic points throughout the training where you can pose questions to the participants. These questions should encourage interaction, stimulate discussion, and deepen their understanding of the topic. **(Review Slides 10, 23, 34)**

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	Familiarize yourself with the ice breaker activity: Understand the purpose and instructions of the ice breaker activity. Consider how you will introduce it, moderate the sharing of participant experiences, and manage the time allotted for this activity. **(Review Slides 6 and 7)**
	Coordinate with the producer: Communicate with the producer to align on the session flow, technology requirements, and any specific instructions. Discuss how you will introduce the facilitator and producer at the designated time. **(Review Slide 3)**
	Prepare for the breakout room activities: Familiarize yourself with the breakout room activities and case studies. Understand the objectives of each activity and how they relate to the training content. Prepare any additional instructions or guidance needed for the participants. **(Review Slides 17-19 and 29-31)**
	Anticipate participant questions: Consider potential questions or challenges that participants may have during the training. Prepare thoughtful responses or solutions to address these inquiries effectively. **(Review Slides 1-39)**
	Ensure technical readiness: Test the virtual platform, audio, and video equipment to ensure they are working correctly. Verify that you can share your screen, display slides, and interact with participants effectively. Familiarize yourself with any necessary features or tools. **(Review these features in the Zoom virtual platform)**
	Prepare your closing remarks: Plan your closing remarks to summarize the key takeaways, express appreciation for participants' engagement, and offer any final insights or recommendations. Prepare a concise and memorable ending for the training. **(Review Slide 36)**

Session #1		
Slides	**Approximate Timing**	**Topic**
1-7	7 minutes	Introductions, Learning Objectives, Ground Rules, Session Agenda, Ice Breaker Poll Question
8-10	5 minutes	Why Are Client Relationships Important?
11-19	26 minutes	Effective Communication Techniques
20	5 minutes	Break
21-24	6 minutes	Establishing Trust and Rapport

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25-32	26 minutes	Managing Expectations and Resolving Conflict
33	5 minutes	Break
34-36	3 minutes	Summary and Action Plan, Key Points, Reflection and Action Step
37-41	7 minutes	Closing Remarks, Q &A, References/Resources, Contact Info, Revisit Poll Question
Total:	1.5 hours	

Slide#) Duration	Slide	Facilitator Notes	Producer Notes
1		**<u>TRAINING INTRODUCTION</u>**– 45 seconds [FACILITATOR SAYS] Hello everyone and welcome to our training on Building Strong Client Relationships! I'm thrilled to have you all here as we explore the key strategies for cultivating meaningful connections with your clients. In today's competitive business landscape, building strong client relationships is more important than ever. It forms the bedrock of a successful enterprise, allowing you to foster trust, loyalty, and mutual understanding. By investing time and effort in these relationships, you can unlock a world of opportunities and set yourself apart from the competition.	[PRODUCER DOES] ● Keep track of time ● Notify the facilitator if they are close to going over time

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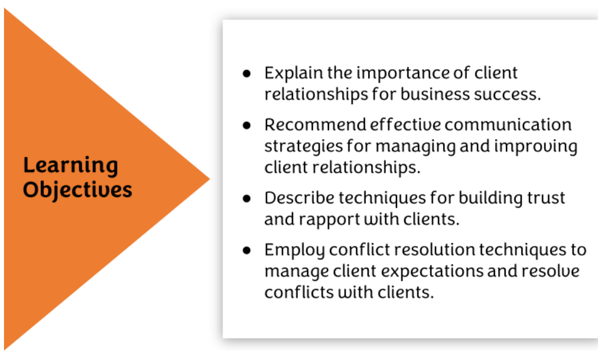
		So, let’s begin our journey together to unlock the power of building strong client relationships. [ADVANCE SLIDE] **[FACILITATOR DOES]** ● Welcomes and introduces audience to course ● Advances to next slide after they finish reading introduction script	
2		**LEARNING OBJECTIVES**– 30 seconds **[FACILITATOR SAYS]** By the end of this training, you will be able to: ● [CLICK] Explain the importance of building strong relationships with clients for business success. ● [CLICK] Recommend effective communication strategies for managing and improving client relationships. ● [CLICK] Describe techniques for building trust and rapport with clients. ● [CLICK] Employ conflict resolution techniques to manage client expectations and resolve conflicts with clients.	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

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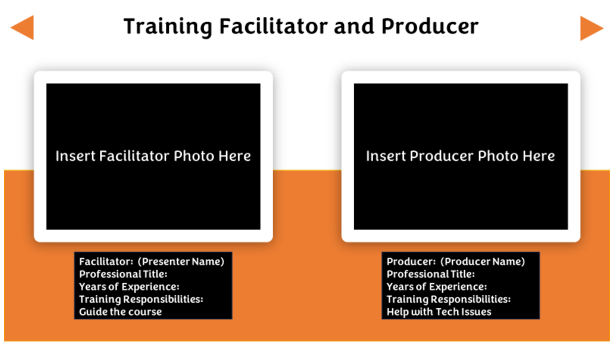
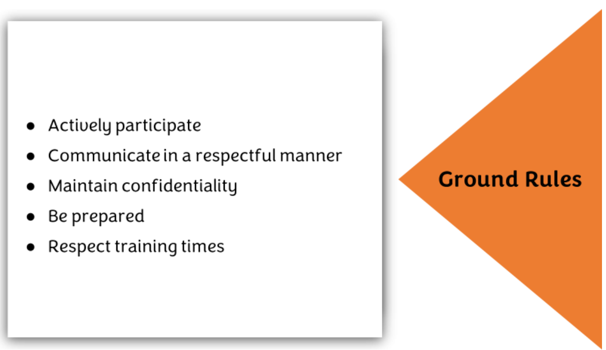
		Now that we understand the key objectives of this training, let's move forward so I can introduce myself, along with the other talented individuals who will be instrumental in helping you throughout this learning experience. [ADVANCE SLIDE] **[FACILITATOR DOES]** ● Click screen to reveal bullet points ● Explain slide content to audience ● Advance to next slide after all slide content has been explained	
3		**INTRODUCTION OF FACILITATOR AND PRODUCER**– 1 minute **[FACILITATOR SAYS]** Hello everyone! I'm [Facilitator's Name], your facilitator for this course on building strong client relationships. Throughout this training, I'll be your guide, drawing on my experience in [mention relevant experience or expertise]. If you have any questions or feel confused, please unmute yourself or type in the chat. We also have [Producer's Name] with us, our dedicated producer who will ensure a smooth technical experience. He/she'll be	**[PRODUCER DOES]** ● Ensure camera is on ● Wave to audience when introduced ● Keep track to time ● Notify the facilitator if they are close to going over time

		monitoring the chat, assisting with breakout rooms, and helping with any technical issues you may have. Don't hesitate to reach out to them. Now, let's establish some ground rules for a productive and engaging learning environment. [ADVANCE SLIDE] **[FACILITATOR DOES]** • Introduce him/herself and the producer to the audience • Advance to next slide after introductions have been made	
4		**<u>GROUND RULES</u>**– 1 minute **[FACILITATOR SAYS]** In this training, we have five important ground rules to ensure a productive and engaging learning environment. First, actively participate by engaging in discussions, asking questions, and sharing relevant experiences. Second, communicate respectfully by maintaining a professional tone, actively listening, and providing constructive feedback. Remember to remain muted unless asked to speak. You can also use the	**[PRODUCER DOES]** • Keep track of time • Notify the facilitator if they are close to going over time

		"Raise Hand" reaction or chat for immediate questions or concerns and I'll get to you as soon as possible. Third, maintain confidentiality by respecting the sensitive information or personal experiences shared by others. Do not disclose or share such information without permission. Fourth, be prepared by having your materials ready and being mentally engaged. Keep your camera on during the session to stay connected. Lastly, respect set times by adhering to the schedule. Stay present and minimize distractions. In case of emergencies, please return to the session as promptly as possible. By following these ground rules, we can create a positive and effective learning environment. Now, let's get started with our training on building strong client relationships! [ADVANCE SLIDE] **[FACILITATOR DOES]**	

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		● Click screen to reveal bullet points ● Explain slide content to audience ● Advance to next slide after all slide content has been explained	
5		<u>**SESSION AGENDA**</u>– 1 minute **[FACILITATOR SAYS]** Today's training will cover important aspects of building strong client relationships. We'll start with an icebreaker poll to gauge your current confidence level. Then, we'll explore the significance of client relationships for business success. Next, we'll dive into effective communication techniques that foster engagement with clients. We'll also discuss establishing trust and rapport through effective communication. Additionally, we'll explore strategies for managing expectations and resolving conflicts. Towards the end, we'll have a reflection and action planning session, followed by a Q&A session. Finally, we'll revisit the poll question to see if your confidence-level has changed. Now that we have a clear overview of the agenda for today's training… [ADVANCE SLIDE]	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

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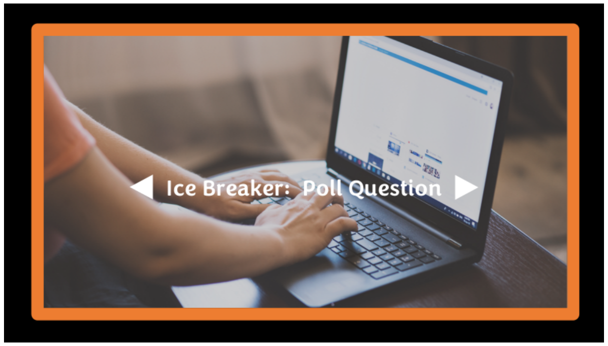
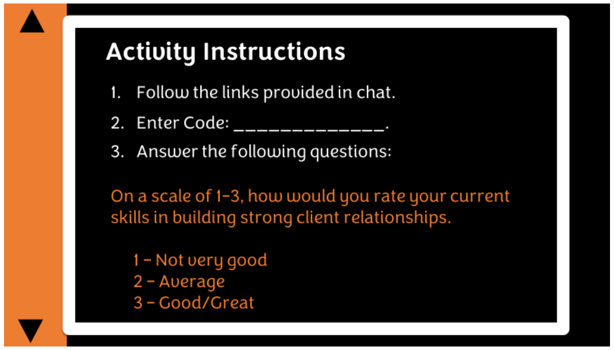
		[FACILITATOR DOES] ● Click screen to reveal bullet points ● Explain slide content to audience ● Advance to next slide after all slide content has been explained	
6	 	**ICE BREAKER: POLL QUESTION (INTRODUCTION)**– 5 seconds **[FACILITATOR SAYS]** Let's start with our ice breaker poll question [ADVANCE SLIDE] **[FACILITATOR DOES]** ● Introduce concept to audience ● Advance to next slide after giving introduction	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time
7	 	**ICE BREAKER: POLL QUESTION (ACTIVITY)**– 2 minutes (1 min set up, 30 seconds for response, 30 seconds for debrief) **[FACILITATOR SAYS]** This quick poll question will gauge your current level of confidence in the area of building client relationships. In the chat, you will find a link that will direct you to the question displayed on the screen. Please rate your current level of	**[PRODUCER DOES]** ● While Facilitator is introducing the activity, navigate to the Mentimeter website and login. ● Click on the preset Word Cloud activity for "Please rate your current level of confidence in your ability to build strong client relationships on a scale of 1 to 3" and go into Presentation mode.

		confidence on a scale of 1 to 3, where 1 represents "not very confident," 2 represents "in the middle," and 3 represents "confident/very confident." Once you click the link, you will be prompted to enter a code. Please enter the code [insert code] to access the poll. After you've entered your response, a word cloud will be generated based on everyone's answers. Don't forget to hit "submit" at the bottom before returning here for our discussion. You have 30 seconds to respond starting now. *[Allow participants to respond to the poll]* Thank you for your participation! Let's take a look at the word cloud and see the collective responses. As you can see, the majority of you feel [mention confidence rating represented by the largest word] about your ability to build strong client relationships. This gives us valuable insight into the group's starting point. We will revisit this question at the end of the course to see if and how your perceptions may have changed.	● Post a link in chat to the “Please rate your current level of confidence in your ability to build strong client relationships on a scale of 1 to 3” Mentimeter page. ● Switch the screen from the PowerPoint presentation to the Mentimeter page so that participants can see it in real time. ● Keep track of time using the timing instructions provided. ● Allow 30 seconds for attendees to place their thoughts into the word cloud by setting the timer.

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		Now, let's delve into the course material. [FACILITATOR DOES] ● Explain instructions to audience ● Debrief the outcome of the poll question ● Advance to next slide after activity debrief **NOTE** When this is set up in advance in Mentimeter, we will need the URL for the participants, the URL to display the results, and the code. [ADVANCE SLIDE]	
8		**<u>IMPORTANCE OF CLIENT RELATIONSHIPS (INTRODUCTION)</u>**– 10 seconds [FACILITATOR SAYS] Now that we have evaluated our current skills in building strong client relationships, let's delve into the importance behind cultivating these connections and address the question: why is building strong client relationships so important? [FACILITATOR DOES] ● Introduce concept to audience ● Advance to next slide after giving introduction	[PRODUCER DOES] ● Keep track of time ● Notify the facilitator if they are close to going over time

		[ADVANCE SLIDE]	
9		<u>**WHY ARE CLIENT RELATIONSHIPS IMPORTANT?**</u>– 2 minutes **[FACILITATOR SAYS]** Building client relationships is crucial for the success of any business. Strong client relationships serve as the **[CLICK]** foundation upon which businesses thrive. When clients trust and value your expertise, they are more likely to engage in repeat business and become advocates for your brand. This not only enhances customer retention but also brings in new through referrals and positive word-of-mouth. In addition, strong client relationships **[CLICK]** foster better communication and collaboration. When you have a solid rapport with your clients, you can understand their needs, expectations, and challenges more effectively. This understanding enables you to tailor your products or services to meet their specific requirements, resulting in higher customer satisfaction and exceptional outcomes.	**[PRODUCER DOES]** • Keep track of time • Notify the facilitator if they are close to going over time

		Moreover, building strong client relationships provides **[CLICK]** a competitive edge in today's market. With numerous choices available to consumers, it is through the relationships you establish that you can differentiate yourself. Clients who feel valued and appreciated are less likely to be swayed by price alone and prioritize the relationship and overall experience with your company. Investing in strong client relationships also ensures **[CLICK]** long-term business stability. During times of uncertainty, loyal clients are more likely to stand by your side. By fostering a sense of partnership and loyalty, you can navigate challenges together, ensuring the longevity and growth of your business. Now that we have explored the importance of building strong client relationships, let's take a moment to relate these concepts to your personal experiences. **[FACILITATOR DOES]** ● Click screen to reveal bullet points ● Explain slide content to audience ● Advance to next slide after all slide content has been explained	

		[ADVANCE SLIDE]	
10		**DISCUSSION QUESTION**– 2 minutes (30 seconds to introduce question; 30 seconds think time, 1 minute to share and debrief) **[FACILITATOR SAYS]** Now, let's take a moment to relate these concepts to your personal experiences. Have any of you personally experienced or witnessed the positive impacts of building strong client relationships in your professional lives? If so, we would love to hear a specific example of how cultivating these relationships contributed to better communication, provided a competitive edge, or led to long-term business stability. I will give you 30 seconds to think of an example. Once you have thought of one, please press the thumbs-up icon to let me know you're ready. You may start now. *[Allows 30 seconds for participants to think]* Now, I will call on 2 people to briefly share their experiences. Let's start with [audience member's name]. *[Give audience member 30 seconds to share]*	**[PRODUCER DOES]** ● While the facilitator is introducing the discussion question, project the 30-second think timer to learners. ● Start timer when facilitator tells audience to begin thinking ● Return screen to discussion question slide when 30-second timer completes

		Thank you for sharing. Next, [audience member's name], please share your experience. *[Give audience member 30 seconds to share]* Thank you for sharing. Hearing each of your experiences has provided us with valuable real-life examples that deepen our understanding of the practical benefits associated with investing in client relationships. These insights will further enhance our learning journey. **[FACILITATOR DOES]** ● Call on audience members to share ● Comment on shared experience to highlight practices that align with training content discussed ● Advances to next slide after activity	

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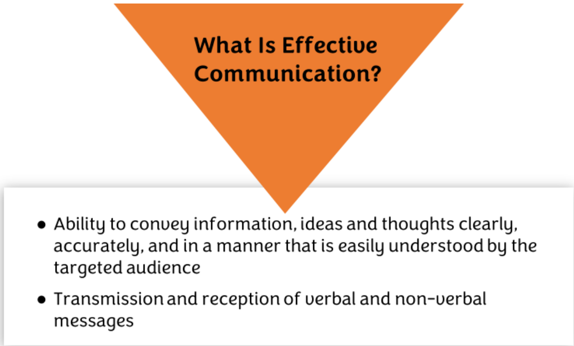
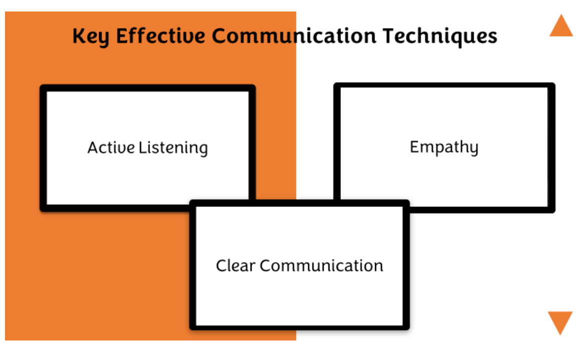
11		**<u>EFFECTIVE COMMUNICATION TECHNIQUES (INTRODUCTION)</u>**– 10 seconds **[FACILITATOR SAYS]** Now that we understand the importance of client relationships, let's focus on how we can create strong connections. We can use three types of techniques: effective communication, building trust and rapport, and managing expectations and conflict resolution. Let's begin by looking at effective communication techniques. **[FACILITATOR DOES]** ● Introduce audience to the concept ● Advance to next slide after completing introduction ADVANCE SLIDE]	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time
12		**<u>WHAT IS EFFECTIVE COMMUNICATION?</u>**– 30 seconds **[FACILITATOR SAYS]** So, what exactly do we mean when we talk about effective communication? Well, when we talk about effective communication, we are referring to: **[CLICK]** the ability to convey information, ideas, and thoughts clearly, accurately, and	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

		in a manner that is easily understood by the intended audience. It involves both **[CLICK]** the transmission and reception of verbal and non-verbal messages Ultimately, effective communication aims to establish a shared understanding, facilitate meaningful interactions, and build strong connections between the parties involved. **[FACILITATOR DOES]** ● Click screen to reveal bullet points ● Explain slide content to audience ● Advance to next slide after all slide content has been explained [ADVANCE SLIDE]	
13		**KEY EFFECTIVE COMMUNICATION TECHNIQUES**– 30 seconds **[FACILITATOR SAYS]** Now, you may be wondering, what specific techniques can we use to enhance our communication skills with clients to establish this shared understanding and build strong connections? Effective communication encompasses various components, but it primarily relies on three key techniques:	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

		[CLICK] Active listening **[CLICK]** Clear communication, and **[CLICK]** Empathy Let's take a closer look at each of these techniques, starting with active listening. **[FACILITATOR DOES]** ● Clicks screen to reveal text inside of each box ● Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	
14		<u>**ACTIVE LISTENING**</u>– 3 mins (2 minutes for explanation; 15 seconds for engagement question directions; 20 seconds for audience response, 25 seconds for debrief) **[FACILITATOR SAYS]** Active listening plays a crucial role in effective communication. To truly engage with our clients and understand their needs, we must employ specific active listening techniques. Let's explore these techniques together. The first technique is **[CLICK]** showing genuine interest. By demonstrating sincere curiosity and	**[PRODUCER DOES]** ● Keeps track of time ● Notifies the facilitator if they are close to going over time ● Records audience responses on pre-made response data sheets (will be used to create breakout room groups later)

		attentiveness to our clients' words, tone, and body language, we can better understand their needs, concerns, and preferences. Next, we have **[CLICK]** reflective listening. This involves paraphrasing or summarizing the client's statements to show that we understand and validate their perspective. Phrases like "If I understand correctly, you're saying..." or "It sounds like you're looking for..." are useful for this technique. **[CLICK]** Clarifying questions are another important technique. By seeking clarification when needed, we ensure a clear understanding of the client's communication. Open-ended questions encourage them to provide more details and insights. **[CLICK]** Validating emotions is crucial. Express empathy and understanding towards the client's emotions. Phrases such as "I can understand why that would be frustrating" or "It sounds like you're feeling concerned about..." show that we acknowledge their feelings.	

		[CLICK] Maintaining a client-centered focus is vital. It's important to keep the conversation centered on the client and their needs, avoiding personal interjections unless directly relevant to their situation. **[CLICK]** Taking notes during the conversation demonstrates that we value the client's input and helps us remember important details for future reference. **[CLICK]** Providing verbal and nonverbal feedback shows active engagement. Verbal cues like affirmations, nods, or appropriate vocalizations, along with nonverbal cues such as maintaining eye contact and open body language, signal attentiveness. Lastly, we should **[CLICK]** avoid interruptions and distractions. By allowing the client to speak without interruption and minimizing distractions like phone notifications or side conversations, we can fully focus on the client and the conversation at hand. By incorporating these active listening techniques into our client interactions, we demonstrate attentiveness and establish a	

		strong foundation for effective communication and relationship building. Now, let's gauge your confidence in employing these active listening techniques. On a scale from 1 to 3, with 1 meaning not very confident and 3 meaning very confident, please type your answers in the chat but do not press "Enter“ yet. We will all press "Enter" at the same time when I count to 3. So, type in your response now *[Give audience 10 seconds to type response]* 1, 2, 3 GO! Wow, it looks like many of you are feeling [name the confidence level(s) you see the most in the chat] in your use of active listening techniques. Thank you for your responses. Let’s move on to the next technique. **[FACILITATOR DOES]** ● Click screen to reveal bullet points ● Explain slide content to audience ● Explain directions for engagement questions ● Read audience responses to engagement question as they appear in the chat	

		● Advance to next slide after debrief [ADVANCE SLIDE]	
15		**CLEAR COMMUNICATION TECHNIQUES**– 3 mins (2 minutes for explanation; 15 seconds for engagement question directions; 20 seconds for audience response, 25 seconds for debrief) [FACILITATOR SAYS] Clear communication techniques play a vital role in establishing successful client relationships. By employing specific strategies, professionals can effectively convey their thoughts, ideas, and information to clients in a manner that is easily understood. These techniques include: **[CLICK]** Using simple language: Communicate in a clear and straightforward manner, using language that is easy for clients to understand **[CLICK]** Organizing thoughts logically: Structure your communication in a logical and coherent manner, presenting information in a well-organized format. This helps clients follow the flow of information and comprehend it more effectively.	[PRODUCER DOES] ● Keeps track of time ● Notifies the facilitator if they are close to going over time ● Records audience responses on pre-made response data sheets (will be used to create breakout room groups later)

		[CLICK] Utilizing visual aids: Enhance your communication by incorporating visual elements such as charts, graphs, or diagrams. Visual aids can simplify complex concepts, making them more accessible and engaging for clients. **[CLICK]** Minding tone and delivery: Pay attention to your tone of voice and delivery style. Use a respectful, friendly, and professional tone that aligns with the client's expectations and preferences. Nonverbal cues like maintaining eye contact and open body language also contribute to effective communication. **[CLICK]** Using active voice and simple sentences: Employ active voice and simple sentence structures to convey your messages clearly. Active voice ensures clarity by specifying the subject and action, while simple sentences avoid unnecessary complexity and aid comprehension. **[CLICK]** Checking for understanding: Regularly verify that clients have understood the information you have communicated. Encourage them to ask questions or provide feedback, and address any misunderstandings promptly to ensure mutual understanding.	

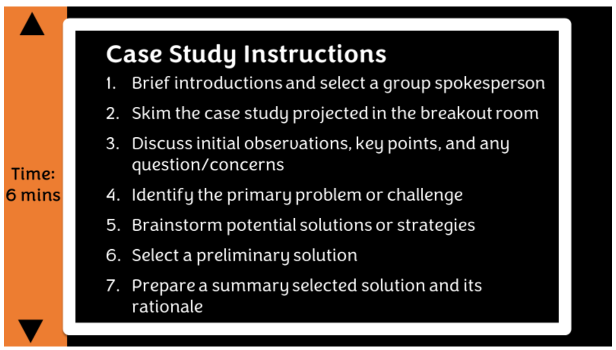
		[CLICK] Adapting to audience needs: Tailor your communication style to the needs of your audience. Adjust your language, level of detail, and approach to accommodate their background, expertise, and communication preferences. Adapting to their needs fosters better understanding and engagement. **[CLICK]** Using relatable examples and analogies: Enhance comprehension by using relatable examples or analogies. Relating concepts to familiar situations helps clients connect the information to their own experiences, making it easier for them to understand and remember. And, finally, **[CLICK]** Minimizing jargon and technical terms: Avoid excessive use of industry-specific jargon or technical terms. Instead, use plain language that clients can easily understand. Minimizing jargon promotes clarity and ensures that clients can fully comprehend the information being conveyed. By incorporating these techniques into our communication practices, we can foster better understanding, minimize misunderstandings, and strengthen our	

		overall communication skills. Now, it's time to gauge our current implementation of these techniques. After hearing this information, please press the 'thumbs up' reaction if you feel you do a good job implementing these techniques with clients. Press the 'thumbs down' if you feel there is room for improvement. Let's wait until the count of 3 before we press our reaction. 1, 2, 3, go! Based on the number of thumbs up and thumbs down, it appears that [comment on the majority response or overall trend]. Thank you for sharing your answers. Now, let's proceed to the final technique for effective communication. **[FACILITATOR DOES]** ● Click screen to reveal bullet points ● Explain slide content to audience ● Explain directions for engagement questions ● Read audience responses to engagement question as they appear in the chat ● Advance to next slide after debrief [ADVANCE SLIDE]	

16	 	**EMPATHY TECHNIQUES**– 3 mins (2 minutes for explanation; 15 seconds for engagement question directions; 20 seconds for audience response, 25 seconds for debrief) **[FACILITATOR SAYS]** Empathy is crucial for strong client relationships. It shows that we genuinely understand and care about their thoughts, feelings, and experiences. Let's explore some techniques to cultivate empathy in our communication: First, **[CLICK]** listen to understand. Give clients your full attention, show genuine interest, and focus on understanding their perspective without interruption. Next, **[CLICK]** validate their emotions. Acknowledge and empathize with their feelings, using phrases like "I can understand why that would be frustrating" or "It sounds like you're feeling concerned about...". **[CLICK]** Reflect and paraphrase their statements. This shows active listening and helps clarify any misunderstandings,	**[PRODUCER DOES]** ● Keeps track of time ● Notifies the facilitator if they are close to going over time ● Records audience responses on pre-made response data sheets (will be used to create breakout room groups later)

		demonstrating that you value their thoughts and understanding. **[CLICK]** Use empathetic language. Carefully choose words that convey empathy and understanding, such as "I can imagine that must be challenging for you" or "I appreciate the effort you've put into this project." **[CLICK]** Practice cultural sensitivity. Recognize and respect diverse communication styles and adapt your approach accordingly, fostering an inclusive and empathetic environment. **[CLICK]** Put yourself in their shoes. Imagine their circumstances, challenges, and goals to gain a deeper understanding. This enables you to respond with greater empathy and tailored solutions. Finally, **[CLICK]** offer support and solutions. Once you understand their perspective, provide assistance and viable solutions that address their specific needs. Incorporating these empathy techniques into our communication fosters trust, strengthens relationships, and enables us to meet our clients' needs more effectively.	

		What I want to find out now is whether any of you have personally encountered any of these practices while interacting with clients. If you have, please leave your camera on, and if not, please turn your camera off. Let's wait for the count of 3 before you respond. Ready? 1, 2, 3, Go! *[Give clients 20 seconds to respond]* Wow! I can see [comment on the majority response or overall trend]. Thank you for your responses. **[FACILITATOR DOES]** ● Click screen to reveal bullet points ● Explain slide content to audience ● Explain directions for engagement questions ● Read audience responses to engagement question as they appear in the chat ● Advance to next slide after debrief [ADVANCE SLIDE]	

17		**CASE STUDY ANALYSIS**– 10 seconds **[FACILITATOR SAYS]** ● Now, it's time to see how much we've learned so far by doing a case study analysis. **[FACILITATOR DOES]** ● Introduces audience to the case study ● Advances to next slide after completing introduction [ADVANCE SLIDE]	**[PRODUCER DOES]** ● Keeps track of time ● Notifies the facilitator if they are close to going over time
18		**CASE STUDY INSTRUCTIONS**–2 mins (directions & room set up) **[FACILITATOR SAYS]** In this case study analysis, [producer name] has divided you into groups of five for breakout rooms. Once you enter your breakout room, please introduce yourselves quickly by stating your name and current work location. Also, appoint a group spokesperson. In your breakout room, the case study you need to analyze will be projected for all group members to see. Take a moment to skim through the case study and understand its main details and context.	**[PRODUCER DOES]** ● Create breakout room groups with 3-4 participants in each group (each group should be a mix of participants with different confidence levels according to the response question data sheet) ● Keep track of time ● Notify the facilitator if they are close to going over time

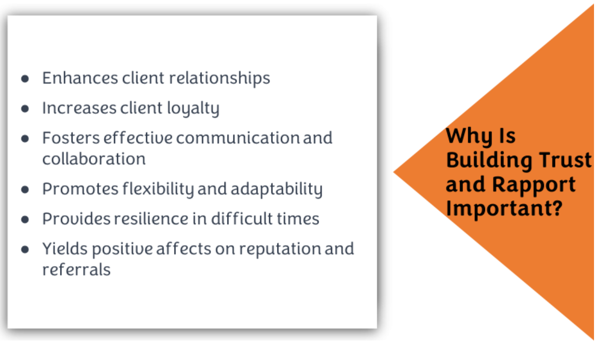
		As a group, engage in a focused discussion to share your initial observations, key points, and any immediate questions or concerns that arise from the case study. Identify and discuss the primary problems or challenges presented, considering different perspectives and potential underlying issues contributing to it. Then, conduct a quick brainstorming session together, generating potential solutions or strategies to address the identified problem or challenge. Think creatively and suggest as many ideas as possible within the given time frame, taking into account the strategies discussed in the slide deck printouts or the participant's guide (refer to specific page numbers if needed). Once you have completed the brainstorming session, select a preliminary solution as a group, based on its potential impact and feasibility. Make sure to consider the rationale behind your choice. Finally, prepare a summary of the selected solution and its rationale to present to the entire group. You will have 6 minutes to complete this case study once the timer starts. It's crucial for all group members to actively engage, listen to each other's perspectives, and	

		contribute to the discussion to make the most of the allotted time. Both [producer name] and I will be moving between the breakout rooms to provide guidance, briefly answer questions, and ensure the discussions stay on track. When there is one minute left of work time, we will provide a warning bell sound like this [producer plays sound]. This sound indicates that your group should wrap up your discussion points, so the group spokesperson is ready to present your strategies and solutions to the whole group. Is everything clear so far? Please feel free to ask any clarifying questions if needed. Great! [Producer's name] will now send you the link for your breakout room. Please click on it as soon as possible because the time will start once the links are sent out. **[FACILITATOR DOES]** ● Explain instructions to audience ● Ensure directions and expectations are clear to the audience **[PRODUCER DOES]** ● Create breakout room groups with 3-4 participants in each group (each group	

		should be a mix of participants with different confidence levels according to the response question data sheet) [ADVANCE SLIDE]	
19		*This slide will be projected in each breakout room **CASE STUDY ACTIVITY**– 10 mins (6 mins. case study analysis, 4 mins share, discuss, and summarize) [AFTER BREAKOUT ROOM SESSION] **[FACILITATOR SAYS]** Let's begin with [mention a participant's name] group. Group spokesperson, please provide us with a brief summary of your group's findings. We will then proceed to hear from each group in the same manner. From our findings, we can see that [mention consistent findings and suggested strategies]. Please keep these in mind if you ever encounter a similar situation. **[FACILITATOR DOES]** ● Visit each breakout room to provide guidance, answer questions briefly, and ensure that the discussions are on track.	**[PRODUCER DOES]** ● Project case study to each breakout room ● Set 5-minute timer for case study analysis ● Set warning bell to ring 1 minute before time is up ● Visit each breakout room to provide guidance and assistance ● Set 2-minute timer for audience sharing ● Notify facilitator when time is up

		● Reconvene the participants in the main session and invite each breakout room spokesperson to share a brief summary of their group's analysis and the preliminary solution they have selected ● Facilitate a brief whole group discussion to compare different solutions proposed by each group as they present ● Summarize the key points discussed during the breakout room analysis ● Thank the participants for their active participation and encourage them to continue reflecting on the case study analysis in their personal learning **In this case study, you are evaluating learners to see if they identify active listening, clear communication, and empathy as problems and suggest solutions that include active listening, clear communication, and empathy techniques discussed in the training. [ADVANCE SLIDE]	

20		**<u>BREAK TIME</u>**– 5 minutes **[FACILITATOR SAYS]** Alright, everyone, it's time for a well-deserved 5-minute break. Please step away from your screens, stretch your legs, and give your minds a chance to recharge. Use this time to grab a drink, take a few deep breaths, or simply relax. We'll reconvene shortly when the timer expires, so be sure to be back on time. Enjoy your break! **[FACILITATOR DOES]** ● Provide learners with directions for break time ● Advance to Slide 21 when facilitator stops timer [ADVANCE SLIDE]	**[PRODUCER DOES]** ● Start timer after facilitator provides learners with directions for the 5-minute break ● Stop timer when it rings
21		**<u>BUILDING TRUST AND RAPPORT</u>**– 15 seconds **[FACILITATOR SAYS]** We will now shift our focus to the next set of techniques: those that enable us to establish trust and rapport. By mastering the following strategies and practices, you can develop strong and meaningful relationships with your clients.	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

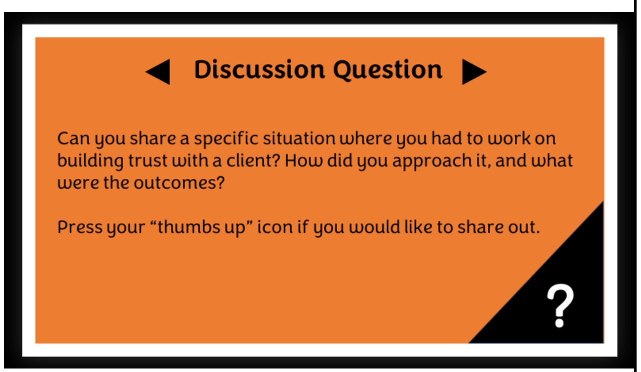
		[FACILITATOR DOES] ● Introduces audience to the concept ● Advances to next slide after completing introduction [ADVANCE SLIDE]	
22		**WHY IS BUILDING TRUST AND RAPPORT IMPORTANT?-** 2 minutes **[FACILITATOR SAYS]** Building trust and rapport with clients is crucial for several reasons. First **[CLICK]** enhancing client relationships is a key benefit of building trust. Trust forms the foundation of strong connections. When clients trust and have good rapport with you, they feel comfortable being open and honest. This leads to effective communication, the sharing of valuable information, and collaborative efforts. Ultimately, trust fosters a positive working relationship, resulting in better outcomes and increased client satisfaction. **[CLICK]** Building trust and rapport also increases client loyalty. Trust is a fundamental driver of loyalty. When clients trust you, they are more likely to continue working with you and become long-term partners. They become less inclined to seek	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

		alternative solutions or switch providers. Building trust and rapport can lead to repeat business, referrals, and positive recommendations, which significantly contribute to the growth and success of your business. **[CLICK]** Effective communication and collaboration are also enhanced when trust and rapport exist. Trust facilitates open and honest communication. Clients feel comfortable expressing their concerns, goals, and expectations, allowing for better understanding, alignment, and prompt addressing of challenges or adjustments. Furthermore, trust **[CLICK]** enables flexibility and adaptability in client relationships. When clients trust you, they are more receptive to suggestions, changes, or new ideas. They have confidence that you have their best interests in mind, which fosters a willingness to explore innovative approaches or solutions. Trust and rapport also **[CLICK]** provide resilience in difficult times. When faced with setbacks or unforeseen circumstances, clients who trust you have	

		confidence in your ability to overcome obstacles. This trust strengthens the partnership, enabling both parties to work together, find solutions, and navigate through challenging times. Lastly, building trust and rapport can **[CLICK]** have a positive impact on your business's reputation and referrals. Satisfied and trusting clients are more likely to share positive experiences and recommend your services to others. Word-of-mouth referrals are powerful, and trust and rapport play a significant role in generating new business opportunities. **[FACILITATOR DOES]** Clicks screen to reveal bullet points Explains slide content to audience Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	

23		**<u>TECHNIQUES FOR BUILDING TRUST-</u>** 2 mins **[FACILITATOR SAYS]** Trust is the cornerstone of any successful client relationship. It lays the foundation for effective communication, collaboration, and long-term partnerships. By understanding and applying certain essential techniques, we can foster a sense of confidence, reliability, and integrity that will strengthen our connection with clients and drive mutual success. These techniques are to practice: **[CLICK]** Consistency and Reliability: Consistently deliver on your promises and commitments. Be reliable in meeting deadlines, delivering high-quality work, and providing consistent support. This builds trust by demonstrating that you can be counted on to follow through on your words. **[CLICK]** Open and Transparent Communication: Foster open and transparent communication with your clients. Be proactive in sharing information, updates, and progress reports. Address any concerns or issues promptly and honestly. Transparent communication builds trust by	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

		demonstrating your willingness to be open and honest in your interactions. **[CLICK]** Expertise and Knowledge: Demonstrate your expertise and knowledge in your field. Stay up-to-date with industry trends, best practices, and relevant information. Share valuable insights and advice with your clients to establish yourself as a trusted advisor. **[CLICK]** Integrity and Ethical Standards: Uphold high ethical standards in all your interactions. Act with integrity, honesty, and professionalism. Respect client confidentiality and handle sensitive information with care. Demonstrating ethical behavior builds trust by showing that you can be trusted to act in the best interests of your clients. **[CLICK]** Responsiveness and Timeliness: Be responsive to your clients' needs and inquiries. Timely communication and prompt follow-up are crucial in building trust. Show that you value their time and concerns by being proactive and responsive in your interactions. And finally, **[CLICK]** Going the Extra Mile: Look for opportunities to exceed your clients'	

		expectations. Anticipate their needs and provide exceptional service. Going the extra mile shows your commitment and dedication, which can greatly enhance trust and client satisfaction. By employing these techniques consistently and authentically, you can cultivate strong and enduring relationships built on trust with your clients. [FACILITATOR DOES] ● Clicks screen to reveal bullet points ● Explains slide content to audience ● Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	
24		**DISCUSSION QUESTION**– 2 minutes (30 seconds to introduce question; 1.5 mins to share) **[FACILITATOR SAYS]** Now, I invite you all to share your own experiences and insights so we can learn from one another. Can you briefly share a specific situation where you had to work on building trust with a client? How did you approach it, and what were the outcomes?	**[PRODUCER DOES]** ● While the facilitator is introducing the discussion question, set a 2-minute timer for this part of the training. ● Start timer when facilitator is finished giving directions ● Keep track of time ● Notify facilitator when time is up

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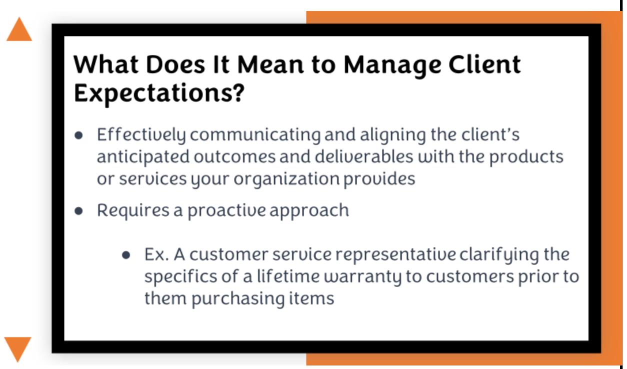
		If you would like to share, press the thumbs up icon so I call on you. [AFTER AUDIENCE MEMBERS SHARE] Thank you for your valuable contributions and insights. Your experiences have provided us with different perspectives that enrich our learning journey and enable us to explore a wider range of strategies and approaches for building client trust and rapport. **[FACILITATOR DOES]** ● Call on audience members to share ● Comment on shared experience to highlight practices that align with training content discussed ● Advances to next slide after activity [ADVANCE SLIDE]	
25		**MANAGING EXPECTATIONS AND RESOLVING CONFLICT**– 30 seconds **[FACILITATOR SAYS]** Now, let's proceed to our final set of techniques: those for managing expectations and resolving conflicts. This essential aspect of building strong client relationships requires careful attention and skillful navigation. By effectively managing expectations and adeptly resolving conflicts,	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

		we can ensure smoother interactions and foster mutual understanding and satisfaction. **[FACILITATOR DOES]** ● Introduces audience to the concept ● Advances to next slide after completing introduction [ADVANCE SLIDE]	
26		**WHAT DOES IT MEAN TO MANAGE EXPECTATIONS?**– 30 seconds **[FACILITATOR SAYS]** ● Managing expectations with clients involves **[CLICK]** effectively communicating and aligning their anticipated outcomes and deliverables with the products or services your organization provides. **[CLICK]** It requires a proactive approach to set clear and realistic expectations from the beginning of the client relationship and throughout its duration. An example of this would be **[CLICK]** a customer service representative clarifying the specifics of a lifetime warranty	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

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		to ensures a customer has a clear understanding of what the warranty entails before making a purchase. Now that we understand what it means to manage expectations, what techniques can we utilize to manage expectations with clients? [FACILITATOR DOES] ● Explains slide content to audience ● Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	
27		**TECHNIQUES FOR MANAGING CLIENT EXPECTATIONS** – 4 mins (2 mins explaining content, 2 mins for responses) [FACILITATOR SAYS] There are several effective techniques for managing client expectations. A few key strategies are to: **[CLICK]** Exercise clear communication. Maintain open and transparent communication channels with clients. Clearly convey product or service details, including features, limitations, pricing, and delivery timelines. Use plain language and	[PRODUCER DOES] ● Sets a 2-minute timer for audience to respond to the question ● Notify facilitator when time is up ● Keep track of time ● Notify the facilitator if they are close to going over time

		avoid technical jargon to ensure understanding. **[CLICK]** Set realistic expectations. Be honest about what clients can expect from your product or service. Avoid overselling or making unrealistic promises that you cannot fulfill. Instead, focus on highlighting the genuine benefits and value you provide. **[CLICK]** Manage timelines. Provide accurate and realistic estimates for product delivery, service completion, or issue resolution. Keep clients informed about any delays or changes to the expected timelines promptly. Strive to meet or exceed these timelines whenever possible. **[CLICK]** Educate clients. Offer educational resources, tutorials, or FAQs to help customers understand how to use your product or service effectively. This reduces the likelihood of misunderstandings and lowers the chances of unrealistic expectations. **[CLICK]** Be transparent in pricing. Clearly communicate the pricing structure, including any additional fees or charges. Avoid surprises for clients by ensuring they	

		have a complete understanding of the total cost upfront. **[CLICK]** Provide effective client support. Maintain a responsive and knowledgeable client support team. Promptly address client inquiries, concerns, or issues to provide timely solutions and prevent dissatisfaction. **[CLICK]** Manage scope creep. If a client's request or demand exceeds the agreed-upon scope of work, have a process in place to address and manage such situations. Communicate any necessary changes to timelines, pricing, or deliverables clearly and in advance. **[CLICK]** Collect feedback and surveys: Regularly collect client feedback to gauge their satisfaction levels. Utilize surveys, ratings, reviews, or feedback forms to gather insights into their experience and identify areas for improvement. And finally, **[CLICK]** Practice continuous improvement. Continuously evaluate and improve your products, services, and processes based on client feedback and changing market trends. Adapt and innovate to meet	

		evolving client expectations and stay ahead of the competition. By implementing these techniques, you can effectively manage client expectations, foster positive client experiences, and build lasting relationships with your clients. So, based on what we have covered in this section so far, I would like to ask: In your opinion, what are the potential risks or consequences of not effectively managing customer expectations? You can either click the "raise hand" option and I will call on you to share out. Or, you can type your answer in the chat. **[FACILITATOR DOES]** ● Clicks screen to reveal bullet points ● Explains slide content to audience ● Explain directions for engagement questions ● Provide feedback to those who share out to ensure the key points are emphasized ● Read audience responses to engagement question as they appear in the chat ● Advances to next slide after all slide content has been explained	

28		**<u>WHAT IS CONFLICT RESOLUTION?</u>**– 30 seconds **[FACILITATOR SAYS]** ● Effective management of customer expectations is closely intertwined with conflict resolution. Conflict resolution refers to: **[CLICK]** the process of addressing and resolving conflicts or disagreements between individuals or groups in a constructive and mutually beneficial manner. It involves **[CLICK]** finding a solution or reaching a resolution that satisfies the interests and needs of all parties involved. **[FACILITATOR DOES]** ● Clicks screen to reveal bullet points ● Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

29		**<u>CONFLICT RESOLUTION TECHNIQUES</u>**– 4 mins (2 minutes for explanation; 30 seconds for engagement question directions; 1.5 minutes for audience response) **[FACILITATOR SAYS]** When it comes to conflict resolution with clients, employing effective techniques can help in reaching a mutually satisfactory resolution. Some key techniques for conflict resolution with clients are: **CLICK]** Active Listening. Practice active listening to fully understand the client's concerns, perspectives, and underlying interests. Demonstrate empathy and create a safe space for them to express their grievances or issues. **[CLICK]** Stay Calm and Professional. Maintain a calm and professional demeanor throughout the conflict resolution process. Avoid becoming defensive or confrontational, and focus on finding a solution rather than assigning blame. **[CLICK]** Clarify and paraphrase. Seek clarification by asking questions and paraphrasing the client's statements. This ensures that you have a clear understanding	**[PRODUCER DOES]** ● Sets a 2-minute timer for audience to respond to the question ● Notifies facilitator when time is up

		of their concerns and prevents misunderstandings. **[CLICK]** Find common ground. Look for areas of agreement or shared goals to establish a foundation for resolving the conflict. Identify common interests and use them as a starting point for finding solutions that satisfy both parties. **[CLICK]** Collaborative problem-solving. Encourage a collaborative approach to problem-solving. Involve the client in brainstorming and exploring potential solutions. Encourage open dialogue and consider alternative perspectives. **[CLICK]** Offer options and alternatives. Present the client with various options and alternatives for resolving the conflict. Provide them with a range of choices to empower them in the decision-making process. **[CLICK]** Seek Win-Win solutions. Strive for solutions that benefit both the client and your organization. Aim for mutually satisfactory outcomes that address the client's concerns while also aligning with your business objectives.	

		[CLICK] Timely and effective communication. Maintain regular and transparent communication with the client throughout the conflict resolution process. Keep them informed of progress, updates, and any changes that may arise. **[CLICK]** Mediation or facilitation. If necessary, involve a neutral third party to mediate or facilitate the resolution process. An impartial mediator can help guide the conversation, ensure fair treatment, and assist in finding a resolution that satisfies all parties. **[CLICK]** Learn and Improve. After resolving the conflict, reflect on the experience and identify any lessons learned. Use the insights gained to improve your processes, communication, and relationship with the client moving forward. By applying these conflict resolution techniques, you can effectively address conflicts with clients, preserve the relationship, and achieve outcomes that satisfy both parties. Now, I want you to think back to what we discussed earlier in our training about effective communication and how it	

		pertains to what we just learned about conflict resolution. How important is effective communication in conflict resolution with clients? Can you share an example where timely and transparent communication helped in resolving a conflict? Once again, you can either click the "raise hand" option and I will call on you to share out. Or, you can type your answer in the chat. [Allow time for audience to respond] Thank you so much for sharing your responses. **[FACILITATOR DOES]** ● Clicks screen to reveal bullet points ● Explains slide content to audience ● Explain directions for engagement questions ● Provide feedback to those who share out to ensure the key points are emphasized ● Read audience responses to engagement question as they appear in the chat ● Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	

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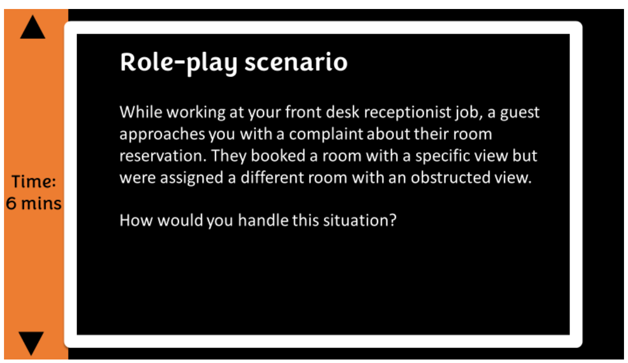
30		**<u>ROLE-PLAY SCENARIO</u>**– 10 seconds **[FACILITATOR SAYS]** ● Now, let's move on to another activity and see how much we've learned so far. This time, we will practice what we've learned by doing a role-play scenario. **[FACILITATOR DOES]** ● Introduce audience to role-play scenario ● Advance to next slide after completing introduction [ADVANCE SLIDE]	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time
31		**<u>ROLE-PLAY SCENARIO (INSTRUCTIONS)</u>**- 2 mins (directions & breakout room set up) **[FACILITATOR SAYS]** For the role-play scenario, we will simulate a conflict resolution situation between a customer and a customer service representative. [Producer's name] will now divide you into pairs. Please take a moment to introduce yourselves quickly if you haven't previously worked together and decide who will play each role. [Say this if there is an odd number of participants]: Note that one of the groups	**[PRODUCER DOES]** ● Create breakout room groups with 2 or 3 participants in each group (each group should be a mix of participants with different confidence levels according to the response question data sheet) ● Keeps track of time ● Notifies the facilitator if they are close to going over time

		will have three participants due to the total number of participants being odd. Once roles have been assigned, begin by reviewing the scenario and considering how to apply the conflict resolution techniques we discussed earlier. If you need a refresher, you can refer to the slide decks in the participant guide on pages [mention page numbers] for guidance. When you feel ready, start the role-play. Immerse yourselves in the assigned roles and actively engage in the conflict resolution process. Once you have completed the scenario, you and your partner will provide feedback and discuss other possible conflict resolution strategies. You will have 5 minutes to complete this role-play scenario once the timer starts. It is crucial for each person to actively participate in their role within the given time frame to maximize learning. Just as with the case study activity, both [producer's name] and I will be moving between breakout rooms to provide guidance, briefly answer questions, and ensure the role-play sessions stay on track.	

		We will also, once again, provide a one-minute warning bell sound like this [producer plays sound] when there is one minute remaining. This sound indicates that your group should wrap up your role-play session and prepare to share your experience with the whole group. If you have any questions or need further clarification, please feel free to ask now. Excellent! [Producer's name] will now send you the link for your breakout room. Please click on it promptly to join because the time will start as soon as the links are sent out. **[FACILITATOR DOES]** ● Explain instructions to audience [ADVANCE SLIDE]	
32		**This slide will be projected in each breakout room **ROLE-PLAY SCENARIO (ACTIVITY)**- 7 mins (5 minutes for role-play scenario, 2 mins share, discuss, and summarize) [AFTER BREAKOUT ROOM SESSION] **[FACILITATOR SAYS]**	**[PRODUCER DOES]** ● Project role-play scenario to each breakout room ● Set 5-minute timer for role-play scenario ● Set warning bell to ring 1 minute before time is up ● Visit each breakout room to provide guidance and assistance ● Keep track of time

		Let's begin by hearing from [mention a participant's name]'s group. Please share with us your experience completing this task, any challenges you encountered, and the techniques you used to address the conflict. We will then proceed to hear from each pair in the same manner. Based on our findings, we can observe [mention consistent findings and suggested strategies]. Please keep these insights in mind for future client management or conflict situations you may encounter in your daily work. **[FACILITATOR DOES]** ● Visit each breakout room to provide guidance, answer questions briefly, and ensure that the discussions are on track. ● Reconvene the participants in the main session and invite each breakout room pair to share their experiences, challenges faced, and the techniques they used to address the conflict. ● Facilitate a brief discussion on the effectiveness of different approaches. ● Encourage learners to provide feedback and suggestions to their peers, highlighting strengths and areas for improvement.	● Notify the facilitator if they are close to going over time

		● Summarize the key takeaways from the role-play and emphasize the importance of conflict resolution techniques in managing customer expectations. ● Thank the participants for their active participation and encourage them to continue reflecting on the role-play scenario in their personal learning [ADVANCE SLIDE] **In this role-play scenario, you are evaluating learners to see if the participants in the customer service representative role demonstrated empathy, actively listened to the customer's concerns, managed expectations by providing temporary solutions, and committed to keeping the customer informed. The goal is to reach a resolution that satisfies the customer and maintains a positive customer relationship.	

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33		**<u>BREAK TIME</u>**– 5 minutes **[FACILITATOR SAYS]** Now, it's time for our second 5-minute break. Take this opportunity to refresh yourself once again. Stretch, grab a healthy snack, or simply take a few moments to rest your eyes. Remember to return promptly so we can continue with the training. Enjoy your break! **[FACILITATOR DOES]** ● Provide learners with directions for break time ● Advance to Slide 34 when facilitator stops timer [ADVANCE SLIDE]	**[PRODUCER DOES]** ● Start timer after facilitator provides learners with directions for the 5-minute break ● Stop timer when it rings
34		**<u>TRAINING SUMMARY/RECAP</u>**– 10 seconds **[FACILITATOR SAYS]** ● As we conclude our training session on improving client relationships, let's take a moment to recap the key points we covered and reflect on our learning. **[FACILITATOR DOES]** ● Introduces audience to the sections ● Advances to next slide after completing introduction	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

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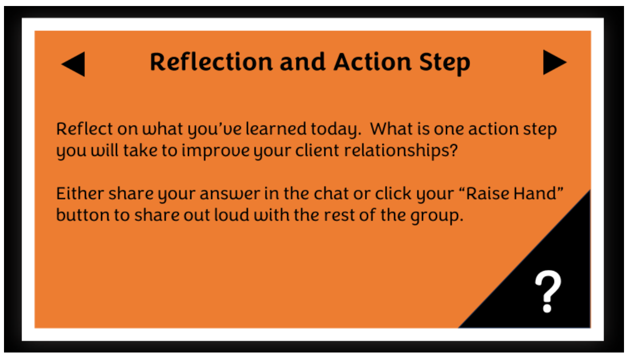
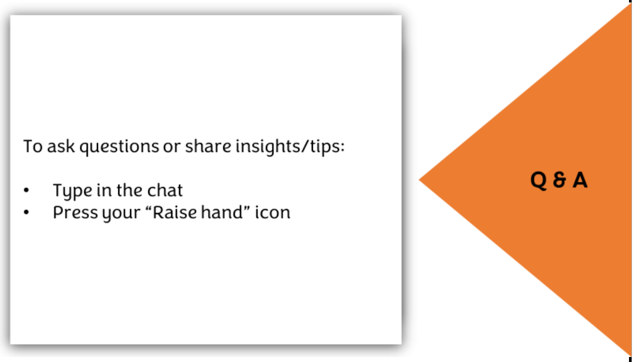
		[ADVANCE SLIDE]	
35		<u>**KEY POINTS**</u>- 1 minute ● [FACILITATOR SAYS] ● In this training, we have learned some valuable key takeaways: First, we understand that **[CLICK]** strong client relationships are crucial for business success and our professional growth. Also, **[CLICK]** active listening, clear communication, and empathy play a vital role in effectively engaging with clients, making our communication impactful and fostering positive relationships. **[CLICK]** Additionally, we have recognized that establishing trust and rapport is essential, achieved through effective communication, reliability, and transparency. Furthermore, **[CLICK]** managing client expectations involves setting realistic goals, maintaining clear and proactive communication, and	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

		ensuring ongoing alignment throughout the client relationship. Lastly, **[CLICK]** we have explored conflict resolution strategies, including active listening, finding common ground, and problem-solving, to navigate conflicts professionally and preserve the client relationship. [ADVANCE SLIDE]	
36		<u>**REFLECTION AND ACTION STEP**</u>– 2 minutes (30 seconds to introduce question, 1 minute to share, 30 seconds to debrief) **[FACILITATOR SAYS]** Now, I invite each of you to reflect on what you've learned today and identify one action step you will take to improve your client relationships when you return to your hotel. Consider the techniques, strategies, and insights that resonated with you the most, and choose one action step that you commit to implementing. You can either share your action step in the chat or by raising your hand, as it may inspire others and create a supportive learning environment.	**[PRODUCER DOES]** ● While the facilitator is introducing the reflection question, set a 3-minute timer for this part of the training. ● Start timer when facilitator is finished giving directions ● Notify facilitator when time is up

		[Allocate sufficient time for participants to share their action steps and acknowledge their contributions.] Thank you all for actively participating and sharing your insights throughout this training. Remember, by implementing your action steps, you can make a real difference in how you engage with your clients and foster long-lasting partnerships. Now, let's move on to the Q&A. **[FACILITATOR DOES]** ● Call on audience members with raised hands to share ● Read and comment on responses in the chat ● Highlight any responses that stand out by elaborating on their connection to the training content ● Thank audience members for sharing ● Advances to next slide after activity [ADVANCE SLIDE]	

37	 	**<u>Q & A</u>**– 2.5 mins (30 seconds for directions, 2 minutes for answering questions) **[FACILITATOR SAYS]** If you have any questions or concerns regarding the training content or any additional insights or tips you'd like to share with the group, please feel free to ask or contribute. I'm here to address any queries you may have for the next 2 minutes. [Answer participant questions and provide any final insights or tips for building strong client relationships.] Okay, our time is up. Let’s move on. **[FACILITATOR DOES]** ● Answer participant questions ● Encourage audience participation ● Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	**<u>[PRODUCER DOES]</u>** ● While the facilitator is introducing the reflection question, set a 2-minute timer for this part of the training. ● Start timer when facilitator is finished giving directions ● Keep track of timer ● Notify facilitator when time is up

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<td><u>CLOSING REMARKS</u>– 30 seconds

[FACILITATOR SAYS]
As we conclude our training, I want to express my sincere gratitude for your active participation and attendance today/tonight. Your engagement and eagerness to learn have been instrumental in fostering a positive and valuable learning environment. I sincerely hope that the information shared during this session has empowered you with valuable insights on enhancing your client relationships.

[FACILITATOR DOES]
● Thank the audience for their presences and participation
● Advances to next slide after thanking audience

[ADVANCE SLIDE]</td>
<td>[PRODUCER DOES]
● Keep track of time
● Notify the facilitator if they are close to going over time</td>
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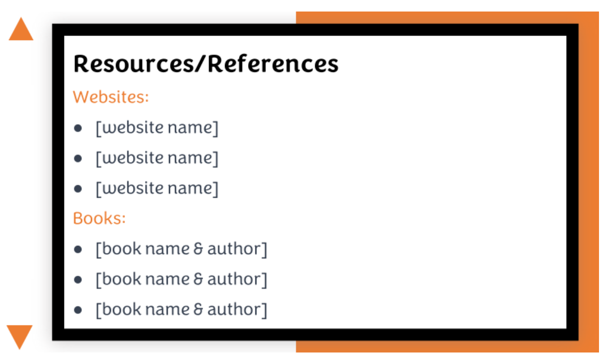
<td>39</td>
<td>
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<td><u>RESOURCES/REFERENCES</u>– 30 seconds

[FACILITATOR SAYS]
If you would like to learn more about strategies for building strong client relationships, please check out [name the websites and/or books that appear on the screen].

[FACILITATOR DOES]</td>
<td>[PRODUCER DOES]
● Keep track of time
● Notify the facilitator if they are close to going over time</td>
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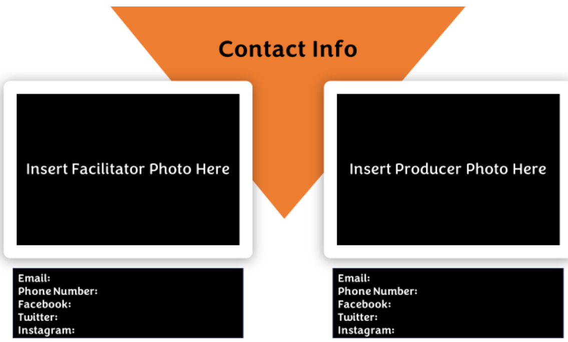
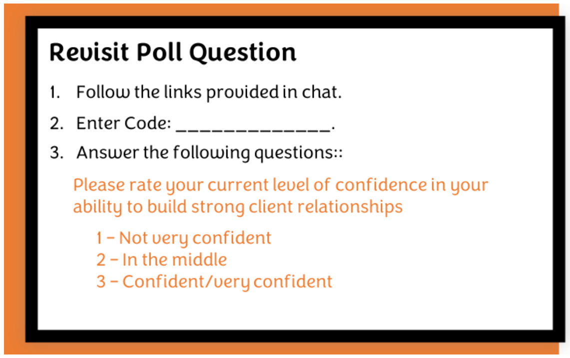
		● Explains slide content to audience ● Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	
40	 	**CONTACT INFO**– 20 seconds **[FACILITATOR SAYS]** Furthermore, if you require any assistance in implementing these strategies for building strong client relationships upon your return to work, feel free to reach out to either myself or [producer name]. Our contact information is provided on this screen and will also be available in the slide deck included in the participant guide. **[FACILITATOR DOES]** ● Explains slide content to audience ● Advances to next slide after all slide content has been explained [ADVANCE SLIDE]	**[PRODUCER DOES]** ● Keep track of time ● Notify the facilitator if they are close to going over time

39	 	**<u>REVISIT POLL QUESTION</u>**– 1 minute **[FACILITATOR SAYS]** Before you leave, I want to invite you to revisit the icebreaker poll question we started with. Now that we've completed the training, what is your current level of confidence in your ability to build strong client relationships, where 1 represents "not very confident," 2 represents “in the middle," and 3 represents “confident/very confident.“ As you did before, click on the link in the chat and enter the code on the screen to provide your answer. Once you have provided your answer, you are free to exit this Zoom session. Thank you once again for your time! [ADVANCE SLIDE] **[FACILITATOR DOES]** ● Close out meeting once all participants have answered	**[PRODUCER DOES]** ● While Facilitator is introducing the activity, navigate to the Mentimeter website and login. ● Click on the preset Word Cloud activity for “Revisit: Please rate your current level of confidence in your ability to build strong client relationships on a scale of 1 to 3” and go into Presentation mode. ● Post a link in chat to the “Revisit: Please rate your current level of confidence in your ability to build strong client relationships on a scale of 1 to 3” Mentimeter page. ● After all answers have been submitted, grab a screenshot of the Mentimeter page to evaluate the success of the training.