

Customer Connections

Facilitator Notes — Template Sample



This sample illustrates the facilitator guide format used to support delivery of the Customer Connections workshop. It provides session flow, timing, activity instructions, debrief guidance, and setup notes to help facilitators run the session confidently in both classroom and virtual environments.

Workshop Summary

This workout is not about improving the way participants do their job. Instead, it's about recognizing the key role that emotions play in customer service agents' day-to-day interactions, and using this knowledge to make them have more good days.

It provides tools to develop genuine connections with customers that satisfies each party's emotional needs, and tips on how to manage their emotions during difficult situations.

Session Overview

Session Length: 90 minutes

Modality: Instructor-led. VILT version is also available

Participant Size: 8-18

Facilitator Kit:

- Slide Deck
- Participant Handouts
- Flipchart Paper
- Pens
- Post-its

Related Topics

Emotional Intelligence | Customer Drivers | Positive Psychology

Classroom Setup

Prepare four flipcharts in different areas of the room

- Results-driven
- Detail-driven
- Reassurance-driven
- Connection-driven

0-9 | Making Your Day

Key Point

To help the participants quickly get the idea that their day is improved when they are able to have meaningful, positive interactions with their customers.

- Introduce yourself
- Get into the first exercise

Exercise Summary

Group think about a particularly good day and a particularly bad day.

Keep this section brief, try to ensure that participants are thinking, rather than sharing, at this point. If not, they'll get into telling stories, which takes time.

Ask: Think about a time when you've come home from work and feel you had a really satisfying day. What happened during that day? What was it about the interactions that made you feel good?

(one minute)

Ask: Think about when you've come home and feel like you've had a very frustrating day. What happened during that day? What was it about the interactions that made you feel bad?

(one minute)

Exercise

- Split the group in two and go to opposite sides of the room (one for good, one for bad).
- Provide handouts and have each group write down emotion words that they associate with good/bad day.
- Takeaway: we'd all rather have more good days, and this workout will help with that.
(one minute)
- Report out and large group discuss/debrief key themes from the two sides of the room.

Debrief

Typically, we use emotive words, and research has shown how important our emotions are, both from customers, but also for how we deal with our interactions with them.

Are there any words we missed?

State: “Unless I’m wrong, we all want a bit more on this side. Well here’s how...”

The purpose of this session is to find ways to make the great days happen more often by increasing the quality of the interactions we have with our customers. We feel happier and fulfilled because...

As humans, we are energized by relationships (no matter how short). In doing so, we’ll be better at our jobs, which leads to satisfaction and a feeling of mastery.

While we’re constantly told that it’s all about the customer, we run the risk of forgetting the other party in the relationship ... us. We also need to think about our own emotional needs. Many of our bad days can be traced back to this emotional need not being met, either on our side, the customer’s, or both.

An awareness of this is the first step in building great customer service.

9-11 | Introduction to the Workshop

Key Point: To talk through the flow of the session

— End of sample excerpt —