

BUILDING CONNECTIONS

USING PROBING QUESTIONS

About this Facilitator Guide

The facilitator guide is designed to be a thorough set of instructions and guidelines for facilitating this training session. Reviewing this document and the course materials will prepare you to facilitate the session.

Training Purpose and Objectives

The purpose of this training is to highlight the importance of building connections with customers, specifically through the use of probing questions. This session will introduce participants to the idea of using probing questions to develop connections, specifically to determine the root cause of customer delinquency.

Objectives

- Understand the importance of probing questions in building connections.
- Determine how to ask questions that are probing.
- Develop a list of probing questions to find out why customers are delinquent.

Target Audience

Customer Service Representatives

Class Size and Setup

This session is best suited for 10-20 participants. Facilitation can be modified to accommodate 20-30 participants.

The most desirable setup for the session facility would be table seating that can easily accommodate groups of 2-3 participants.

Materials

The following materials will be needed to successfully facilitate this session:

- PowerPoint presentation and projection capability
- Easel pad or whiteboard and markers
- Notecards/notepads and pens should be available for participants who do not bring them
- Company-provided/approved sign-in sheet
- Company-provided/approved training evaluation form

Session Organization and Agenda

| Slide | Title/Topic | Time |
|-------|--------------------------------------------------------|------|
| 1 | Topic introduction | 2 |
| 2 | Icebreaker | 5 |
| 3 | Session purpose | 3 |
| 4 | Session objectives | 3 |
| 5 | Introduction to probing questions - revisit icebreaker | 5 |
| 6 | What are probing questions? | 5 |
| 7 | Open vs. closed questions | 5 |
| 8 | Summary | 5 |
| 9 | Learning Activity | 10 |
| 10 | Conclusion | 2 |

All times are approximate. The total time allotted for this session is 45 minutes.

Session Content

This section contains facilitation guidance for each of the presentation slides. The information outlined for each slide includes:

- Slide Topic: Each slide in the presentation is displayed for reference.
- Key Message: The key message provides helpful information about transitioning between slides and includes a summary of the information that should be discussed for each slide. *This is not intended to be a script.*
- Facilitation Guidance: Some slides contain questions for discussion or an activity. This section provides more detailed direction and guidance on facilitating these activities and discussions.
- Approximate Time: This indicates that amount of time it should take to complete the discussion/activity on the slide to keep the session on schedule.

Session Content (continued)

Slide 1

Key Message

This session is on the importance of building connections, specifically how strong connections with customers and the right questions can help determine why customers are delinquent.

Facilitation Guidance

The facilitator should introduce themselves and, if necessary, explain general housekeeping items (e.g. restroom locations).

Approximate Time

2 minutes



Slide 2

Key Message

This short icebreaker will help set the tone for the session and will provide a bridge to later help exemplify the session topic.

Facilitation Guidance

- Ask participants for their answers after they've had a few moments to think.
- Note to yourself the participants who did not provide an explanation or only a brief explanation of their answer.
- Explain this activity will be revisited, so participants should remember their answer.

Approximate Time

5 minutes



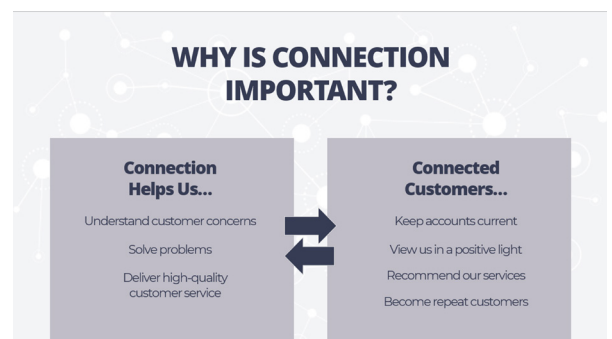
Slide 3

Key Message

This slide explains the session's purpose. The session will highlight the importance of building connections with customers. Explanation should emphasize that good connections are mutually beneficial to both customers and the company. items (e.g. restroom locations).

Approximate Time

3 minutes



Session Content (continued)

Slide 4

Key Message

By the end of this session, participants will better understand the importance of probing questions in building connections, know how to ask probing questions, and have a list of sample probing questions they can use in their conversations with customers.

Facilitation Guidance

Ensure that it is clear to participants how these outcomes support the session's purpose.

Approximate Time

3 minutes

Slide 5

Key Message

The icebreaker activity will be revisited and used as an example to introduce the concept of using probing questions to build connections.

Facilitation Guidance

- Ask participants who did not initially provide an explanation for their icebreaker answer (or only had a brief explanation) why they chose their answer. Continue to ask them and others probing questions about their earlier responses to learn more about the reasons for their answers. Sample questions include:
 - What made you choose...?
 - What type of sauce or other toppings would you choose?
 - What additional information could have made your decision easier?
 - What options have been mentioned that you didn't consider?
- Ask participants how they felt about you as a facilitator during the initial activity when no probing questions were asked versus how they feel about you now.
- E.g., Do you feel a deeper/better connection now?
- Explain that these types of probing questions can be used to establish better relationships by finding out more about another.

Approximate Time

5 minutes

WHAT WILL WE DISCUSS TODAY?

Our time together today will help you...

- 01 Understand the importance of probing questions in building connections.
- 02 Determine how to ask questions that are probing.
- 03 Develop a list of probing questions to find out why customers are delinquent.



Session Content (continued)

Slide 6

Key Message

This slide explains what probing questions are. Probing questions are designed to encourage more thought on a subject. Probing questions help to follow-up and clarify what has already been said and help the questioner learn more about how they are talking to. Listening to understand rather than respond is vital to using probing questions correctly.

Facilitation Guidance

- Provide an example from the previous slide; e.g.,
“I quickly learned that [individual] would choose... but by asking...I learned why.”

Approximate Time

5 minutes

WHAT ARE PROBING QUESTIONS?



Encourage Deep Thought
Follow-Up • Clarify • Learn More
Listen to Understand, Not Respond

Slide 7

Key Message

This slide explains the difference between open and closed questions. Open questions make better probing questions because they encourage the other person to give a more detailed response. Typically, these are “how,” “what,” and “why” questions. In contrast, closed questions can be answered with a simple “yes” or “no” or another one-word answer.


Facilitation Guidance

- Provide an example from the earlier discussion to exemplify open versus closed questions. E.g.,
“Was it hard for you to decide what type of pasta you would be?” versus “What made your decision difficult?” or “What could have made your decision easier?”

Approximate Time

5 minutes

OPEN VS. CLOSED QUESTIONS



Open Questions
Encourage a detailed response
How • What • Why

Closed Questions
Answered with a simple reply
Yes/No • True/False • Multiple Choice

Session Content (continued)

Slide 8

Key Message

This slide summarizes the main ideas of the training. Probing questions can help build connections, which can help us learn more information about customers, their situations, and why they become delinquent.

Facilitation Guidance

- Review the ways to ask probing questions: following up, clarifying, and learning more through open questions

Approximate Time

5 minutes



Session Content (continued)

Slide 9

Key Message

This learning activity will help participants practice what they have learned about connections and probing questions. The activity will provide them with specific examples of questions they can ask customers to determine the root causes of delinquency.

Facilitation Guidance

- Split participants into groups of two or three. Ask each group to come up with a list of probing questions to ask customers to get more information about their reason for being delinquent.
- E.g., What questions can dig deeper? If the customer says they've lost their job or had unexpected expenses arise, what questions will help us learn more about that issue and what we might be able to do to help?
- Explain that it may be helpful to take on a role-play mindframe. Participants can pose questions to another and practice responding to one another's answers with further probing questions.
- Remind participants of the characteristics of good probing questions.
- Provide approximately ____ minutes for the activity.
- After the time has ended or participants begin to wrap up their discussions, debrief by asking one person from each group to share their conversation and their list of probing questions.
- Note the questions on an easel pad or whiteboard for everyone to see. Encourage participants to take notes so they can use the questions later.

Approximate Time

10 minutes



LET'S PRACTICE!

In your group, develop a list of probing questions you can ask a customer to get more information about their reason for becoming delinquent.

Remember:

- Use open questions (what, why, how) to follow-up, clarify, and get more details.
- Listen to understand!

Session Content (continued)

Slide 10

Key Message

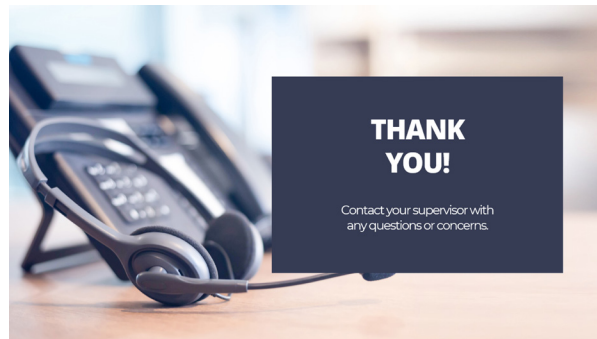
Thank participants for their time, attention, and participation, and encourage them to reach out to their supervisors with any questions or concerns. Evaluations will be completed at this time.

Facilitation Guidance

- Review the ways to ask probing questions: following up, clarifying, and learning more through open questions

Approximate Time

2 minutes



Session Follow-Up

Following this training session, review the completed evaluation forms with Customer Service Representative Supervisors. Together, determine what type of follow-up training is required and the timeframe for that training. Work with Supervisors to track progress. Hard data should include a comparison of calls ended with sufficient answers to customer questionnaires; soft data may include Customer Service Representative feedback.

Facilitator Notes