

## Audience

Senior and mid-level managers who direct processes and resources

## Purpose

To provide participants with strategies and tools for creating the systems and an environment that allow employees to deliver stellar service experiences that result in customer loyalty.

## Payoff

Participants will be able to:

- Discuss how obtaining customer loyalty can help them address key business issues.
- Discuss key concepts that establish a foundation for delivering stellar service.
- Create a service commitment that communicates what they will deliver and how they will deliver it to create stellar service experiences for customers.
- Identify the defining moments in a service transaction that are key to creating a stellar service experience.
- Use customer feedback to analyze and redesign service processes to ensure that they reflect the changing needs of customers.
- Implement service standards in areas where consistency is important to customers.
- Establish and implement methods for improving employee retention and loyalty.
- Create a service culture that supports employees in their delivery of stellar service.

## Duration / Maximum group size

2 days / 15 participants

## Process

Participants will complete a variety of individual and group activities, including:

- Apply key concepts that form the foundation for stellar service.
- Create a *service commitment* that serves as the framework for all service actions, decisions, and standards.
  - Who is my key customer segment?
  - What do I do for them?
  - How do I want them to *feel* about the service I provide?
- Use customer feedback to create a *Customer Experience Roadmap* and then redesign the interaction to align with the service commitment.
- Create a service culture and service standards in areas that matter to customers (who do I hire, how do I develop them, what are our policies and goals).
- Prepare to apply the tools on the job with subordinates.

The course was designed to best meet the needs of its specific audience:

- Level of sophistication, intelligence, and understanding of basic subject matter
- Self- and organizational accountability (especially relative to pre-work and post-work)
- Comfort with certain media and environment, yet not with others
- Involvement in, and influence on, related organizational initiatives
- Natural role, after the training, as a leader and mentor

### Components available

- Facilitator kit (guide, video and digital charts on DVD, wallcharts, activity support materials)
- Champion's pack to ease effective implementation (asynchronous PDF)
- Participant pre-work (asynchronous PDF)
- Participant workbooks (two, with personal action plan and supplemental reading guide)
- Job aids (asynchronous PDF and hardcopy)
- Level 1 perception assessment (asynchronous PDF and hardcopy)
- Level 2 mastery test (asynchronous PDF and hardcopy)
- Level 3 behavioral assessment (asynchronous PDF, hardcopy, and Web)
- Multiple participant-led Involvement Sessions (synchronous PDF)
- Reinforcement messages (asynchronous PDF and hardcopy)

## Workshop Outline: *Leading for Stellar Service*<sup>®</sup>

| Ideal Balance     | Description of process and components  |
|-------------------|--|
| <b>Commitment</b> | <ol style="list-style-type: none"><li>1. LSS is most effective as part of a top-down initiative to improve customer loyalty. So a best practice is for senior leaders to give context and build commitment throughout the organization—especially among middle managers preparing to attend LSS.</li><li>2. Using tools from the LSS "Champion's Pack", the client training administrator sends a letter to each participant's boss. The letter introduces the course and its outcomes, explains the commitment expected of each participant, and challenges the boss to set up a one-on-one meeting with the participant one week after training to plan next steps. The "Champion's Pack" is easily distributed by email in PDF format.</li><li>3. Participants themselves receive pre-work—a robust set of challenges that could take 2 or 3 hours (spread across several days) to complete. The first purpose of the pre-work is to build the case for improving customer loyalty. The second is to give the actual training workshop realism through current employee and customer data. Participant pre-work is easily distributed by email in PDF format.</li></ol> <p>Each participant is asked to meet with his or her direct manager to discuss business results expected from the department or function and to clarify how the manager wants customers to perceive the way they are treated. The participant then uses that information to complete a worksheet identifying key customers and one specific service challenge to work on during the course.</p> <p>Each participant also collects input from internal staff and from the end customers of the participant's specific department or function. This data guides decisions made during and after the course when using tools learned in LSS.</p> |

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| <b>Assessment</b>            | <ol style="list-style-type: none"> <li>1. During the simulation (see “Skills Practice”), each team is scored on its performance using the tools. The business success of the simulated company is determined by that performance, and is compared to the success of other participant teams.</li> <li>2. Several activities in the course call for self and group analyses of specific customer service processes in the participants’ departments or functions. Analysis includes frank but productive feedback from other participants and from the data collected during pre-work surveys.</li> <li>3. Each participant leaves the course with a set of tools to continue process analysis with other key staff and customers.</li> <li>4. Feedback on the training (Level 1) post-measurement tool is included.</li> <li>5. Mastery (Level 2) post-measurement tools are part of LSS’ full “Measurement Kit” that includes the instrument itself, instructions, positioning, rationale, interpretation guide, answer keys, and score sheets.</li> </ol>  |
| <b>Knowledge acquisition</b> | <ol style="list-style-type: none"> <li>1. Facilitated discussion guides participants through foundational service concepts and helps to build the case for service improvement.</li> <li>2. Tools are modeled and concepts illustrated through the use of high-quality video segments created especially for LSS. Video is used to introduce the characters and context of the simulation activity. Audio—in the form of voicemails from simulation characters—is used to provide information and move the activity along. Foundational service concepts are highlighted by short, entertaining “movie trailer” video segments.</li> <li>3. Engaging individual and group activities and partner discussions help participants to learn and to teach each other. Because the courseware assumes that managers are intelligent, motivated, and capable, participants truly learn while doing. Traditional “lecture” is used only where absolutely appropriate.</li> <li>4. Business issue research, tools, concept overviews, and other instruction is provided in writing so participants can read portions during the workshop and have convenient a reference for use during the activities. Although there is minimal reading during the course itself, the text enables each participant to keep progressing and add value to group activities even if certain language or concepts might be personally challenging.</li> <li>5. LSS is guided by a series of electronic slides, creating an environment and process identical to that of a business meeting at the level of this target learner.</li> </ol> |

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| <p><b>Skills practice</b></p> | <ol style="list-style-type: none"> <li data-bbox="440 163 1435 898"> <p>1. LSS is structured around an in-depth business simulation where participants become managers of an imaginary company facing real-life challenges. They have fun as they gain familiarity and confidence with the new concepts and tools. The simulation is as realistic as possible, and was developed after thorough research with managers in various industries.</p> <p>The intent is for learners to manage the imaginary company’s customer service at a macro level, guided by the courseware, and not waste time trying to analyze or improve details. The simulation takes place in an electronics retailer. That setting was chosen because its business model is generally familiar to learners yet foreign enough to those outside the industry that learners won’t get distracted by the specific strategies, systems, or language of the imaginary company.</p> <p>In the simulation there are right and wrong answers, with positive or negative consequences. Learner teams receive feedback on their choices—both from other learner teams and from courseware materials such as market research, financial statements, character voicemails, etc.</p> </li> <li data-bbox="440 772 1435 898"> <p>2. The course uses appropriate redundancy by having participants repeat key actions from the simulation—the second time using real-life data from their organization. This additional practice opportunity best prepares them for application on the job.</p> </li> </ol> |
| <p><b>Application</b></p>     | <ol style="list-style-type: none"> <li data-bbox="440 961 1435 1318"> <p>1. In a typical AchieveGlobal course, generic skills practice is interspersed with activities (role plays, action planners, etc.) that use real-life examples from the learner’s own role. LSS changes that structure by first practicing in the imaginary business simulation, then transitioning to 100% real-life application during the remainder of the two days. Grouped as much as possible as functionally-related teams, participants actually dig into the details of a service process they select. They immediately begin to apply the new tools, using data they gathered from employee and customer surveys assigned as pre-work. The intended outcome is that participants leave with drafts of actual work plans and strategies, ready to get further input from other staff and customers.</p> </li> <li data-bbox="440 1350 1435 1444"> <p>2. Participants take home application tools to use during staff meetings to continue and refine the work begun in LSS. They can download additional copies in PDF format for easy distribution and copying.</p> </li> </ol>   |

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| <p><b>Reinforcement</b></p> | <p>Application and reinforcement are key to the success of LSS. By directly contacting the participant's boss and by making each tool self-led (often with LSS participant as facilitator), reinforcement becomes less passive than at the Deliver and Develop levels—accountability appropriate for managers at the Direct level.</p> <ol style="list-style-type: none"> <li>1. Reinforcement begins even before training starts when, using tools from the LSS "Champion's Pack" (described above). By the time the course starts, a manager-driven reinforcement effort is already in progress.</li> <li>2. Participants receive a significant amount of supplementary reading material for after-class reference. This further describes course content, offers research data and reference sources, and encourages continued education.</li> <li>3. LSS is a sort of "train the trainer" course, during which participants are equipped with fully scripted lesson plans through which they teach staff members the concepts and skills from LSS.</li> <li>4. Participants receive a full-color "debrief map" which outlines LSS content and helps them remember (and share) major messages from the course. They can download additional copies in PDF format, if desired.</li> </ol> |