



**UNIVERSITY
OF ALBERTA**

The Service Excellence Training Program

Learning Journal

Presented in collaboration with



ACADEMIC
IMPRESSIONS

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Introduction

Welcome to the University of Alberta's Service Excellence Training Program (SETP)!

We're delighted that you are here, joining hundreds of other UofA employees as we work towards our shared university service culture. The SETP aims to support service staff and leaders as they develop the core competencies needed to provide service at a high standard, thereby supporting the University of Alberta's empowered and user-focused [service culture](#).

This program is composed of an introductory eClass module, three modules delivered by our friends at [Academic Impressions](#), and three Live Application Sessions that you will attend following the completion of Modules 1, 2, and 3.

For more information on program structure and registering for your Live Application Sessions, visit the [SETP eClass Resource Vault](#). If you have any questions, feel free to email us at org.learning@ualberta.ca.

Using this Learning Journal

This Learning Journal will guide you through Modules 1, 2, and 3 and will include **exploration questions** to consider as you work through the material, **activities and exercises** to complete as you work through the asynchronous video content, a **content review** of the essential information covered in the videos, and **module reflection questions** to consider in preparation for the Live Application Session.

Before beginning each module, we encourage you to review the **module introduction** — including the learning objectives and **exploration questions** — keeping your responses in mind as you work through the module. Once you've started the videos, be sure to follow along in the **session activities** section, write your answers to the questions, and complete activities in the spaces provided. You'll see different activities, including:



Session Activities: An opportunity to implement the content in your specific context. These may include questions asked during the videos or opportunities to pause the video and complete an activity. Activities may involve other members of your team, and you can skip over the activity if needed as long as you return to it!



Take it Further: These are additional opportunities to apply the content to your individual or team practices. These are generally **not** referenced in the videos and are supplementary to the content but are opportunities to explore material and concepts further.

Finally, each section concludes with **module reflection questions** that will help you prepare for the discussions at the live application sessions and **additional resources** if you would like to learn more about the topics discussed in the module.

This learning journal has been developed by UAlberta Human Resources, Health, Safety, and Environment based on the asynchronous SETP videos. It also includes material from ***Elevating Customer Service in Higher Education: A Practical Guide*** by Heath Boice-Pardee, Emily Richardson, and Eileen Soisson. The book is available for purchase electronically or in print on the [Academic Impressions website](#).

Module 1: Service

Module Introduction

This module defines service excellence, considers its importance, outlines its essential components and cultural implications, and explores the knowledge and skills you need to do it well. Module 1 is focused on creating an empowered and user-focused service culture that is designed with clients rather than for clients.

By the end of this module, you will be able to:

- *Outline the importance of providing service excellence at the University of Alberta*
- *Summarize the essential elements of service excellence*
- *Define service culture and its application within higher education*
- *Recognize the cycle of service in every client experience*
- *Identify competencies necessary for delivering excellent service*

Exploration Questions

Before you begin Module 1, review the questions below and jot down a few thoughts for each. Keep these questions in mind as you work through each session.

1. What is excellent service? What might it look like in your area?
2. Why is it essential to provide excellent service? What are the possible consequences of providing less than excellent service?
3. What knowledge and skills do you need to provide excellent service? What areas are you already confident in, and what areas would you like to improve?

Session 1: Defining Service

Session 1 Activities



Activity 1.1: Thinking About Service

Think about excellent service that you have received and answer the following questions:

1. What made it great?
2. What are the key lessons from that experience?
3. How might that experience inform the service that you provide?



Activity 1.2: Develop a client profile

Write your answers in the space provided.

Who are your clients?	
For what specific services do your clients come to you?	
Why do your clients need your services?	
When do your clients need your services?	
How might your clients prefer service to be delivered?	
How does the service you provide fit into your clients' experience at/with the university?	
In addition to the specific services outlined above, what do your clients need/expect from you?	



Activity 1.3: Learning more about our clients

Make a plan for how your unit could learn more about clients and their needs.

This plan could address any questions in Reflection 2 that you could not answer and verify or confirm any assumptions about your clients.

Do you have any specific questions about your clients and their needs?	
What tools, strategies, or other sources of information could you use to find out more about your clients and their needs? <i>For example, client surveys or questionnaires, focus groups, post-service evaluations, common client complaints, FAQs, etc.</i>	
What specific questions could you ask your clients to find out more about their needs?	
Who else might you need to consult to implement the tools and strategies you identified? Who will need to be involved in the approval and implementation process?	



A sample client questionnaire is available in the [Additional Resources](#) section for Module 1.



Activity 1.4: Auditing the “Stage”

Put yourself “in the shoes” of your clients and answer the following questions. If possible, conduct an observation visit to your physical office as if you were a client, noting the messages you receive as you enter the space.

1. What messages or information would you encounter before contacting the service provider? What is the process for gathering information or contacting your service?
Consider internet search results, website information, social media posts and email messages.

2. If conducting an observation visit in-person, what messages would you receive after entering the space but before reaching the first point of contact? What else do you notice? *Consider signage, ease of access, waiting spaces, layout, etc.*

3. Rate the physical or virtual “stage” set for the client?
Consider clarity and ease of use of any tools intended to manage queuing or inquiries.

Poor 1 2 3 4 5 Excellent

4. In regards to the “stage” you set for your clients, what has been done well?

5. In regards to the “stage” you set for your clients, what needs to be improved?



By auditing your “stage” (i.e. the physical or virtual spaces that your client may visit before getting to you), you can better understand the challenges or presumptions that your client arrives with.



Activity 1.5: Collecting data to establish a service baseline

How will you know if you are achieving service excellence in your area? Start by gathering data that will help you understand the current state of service in your area. Then conduct a similar review in the future to see where you have made progress. You could use (a combination of) the following tools:

- **Auditing your “stage,”** including your web presence and service location - the questions in **Activity 1.4** and the Observation Visit guide in the **Additional Resources** section are good places to start;
- **Mapping out your service process** from the client’s point of view;
- **Surveying clients** before or after a client service interaction;
- **Inviting a colleague** from a different area to shadow your service operation and share their observations (see sample observation sheet below); or
- **Conducting exit interviews** with clients at the end of a service relationship.

Select one tool – ideally one you do not already use or have not already done – and test it out. What did you learn?



Surveys or exit interviews do not need to be lengthy or done with every client. You are looking for feedback that will give you the “pulse” of the client experience. If done regularly, these kinds of “pulse” surveys can help you identify trends and adjust accordingly.

Content Review

- Service excellence ≠ always fulfilling the client's request.
- Service excellence = meeting and exceeding the client's needs or going above and beyond to find a solution with and for your client.
- Platinum rule - treat clients as they would like to be treated. Not sure how? Ask!
 - Example questions:
 - What are you hoping to achieve in this meeting?
 - Would it be helpful if ...?
 - How would you like to see this resolved?
- Essential components of S.E.R.V.I.C.E.

Set the stage - Conduct a pre-service audit to (re)discover the spaces and information that the client encounters before they ever interact with you.

Explain for understanding - Use accessible language or, if necessary, teach your client the University- or area-specific language that you use.

Respond appropriately - Ask questions that help you fully understand the client's situation and need(s). Be friendly and patient as you work toward a resolution.

Value each opportunity - Consider every interaction —no matter how small — a chance to provide excellent service. Impress repeat clients by remembering their names.

Implementing standards - Collect data to establish a service baseline and then re-evaluate your service at a future date to determine if you are meeting your service goal or standard.

Communicate often - Be in touch regularly with your client, so they know what is going on and that you are thinking of them. Communicate bad news as early as possible so that you and your client have time to co-develop an alternate or interim solution.

Expect some unhappy clients - Focus on recovery. How can you show your unhappy client that they are still a valuable member of your community even though you didn't meet their service expectations?

Session 2: Culture of Service

Session 2 Activities



Activity 2.1: Cycle of Service

Consider how well you understand your client's cycle of service and its various touchpoints:

1. What typical touchpoints might a client go through to reach you and your service unit?
2. What touchpoints might your unit lead them through to reach their desired ends? If you're not familiar with the touchpoints, how might you find out?



Activity 2.2: Moments of Magic

Think about a time when you created a moment of magic for a client.

1. What made that moment exceptional?
2. Now, should that moment be considered exceptional? Or could it be a new standard of service?



Activity 2.3: Discussion - Moments of magic or new standards?

Discuss the moment of magic reflection above with your team and supervisor.

Invite your team members to describe the moments of magic they have created as well.

1. How could these moments of magic inform a new standard of service?
2. What does excellent and sustainable service look like for your team?

Content Review

- **Organizational culture:** the way an organization's members think, act and understand the world around them (Catherine Mattis).
- Within cultural groups, meaning is constantly negotiated and actions are coordinated continuously. What we value and consider acceptable and how we behave can change, which means we can deliberately co-create our organizational culture.
- Principles of service culture at the University of Alberta:
 - User-focused, not inward-looking
 - Respected, not demanded
 - Designed with, not for
 - Working together, not in siloes
 - Empowered and accountable, not passive
 - Streamlined and standardized, not over-engineered
 - Continuous improvement, not static
- **Service cycle:** a sequence of repeatable events that make up a client's service experience, beginning from when they seek out service and ending when they feel their need(s) are met. A service cycle may involve several service providers.
- **Moment of magic:** a positive and memorable experience for the client, usually a result of exceeding client expectations.
- Service excellence is a team effort. Try to:
 - locate your service within your client's service cycle;
 - identify linkages with other UofA service providers; and
 - treat everyone as a potential client.
- A general guideline for approachability: When passing someone in a walkway, give a non-verbal acknowledgement (i.e. head nod, smile, etc.) when they are 10 ft. away from you and a verbal acknowledgement when they are 5 ft. away.

Session 3: Identifying Service Competencies

Session 3 Activities



Activity 3.1: Service Competencies

Consider when and how you may have demonstrated each of the five general service competencies in the past, and jot down some answers to each of the questions - *don't worry, we'll discuss Role-Specific and Technical Skills after!*



This reflection is only a general consideration of these competencies! [Activity 1: Service Excellence Self-Assessment](#) is a more formal assessment of how well you demonstrate the skills and behaviours required of each competency.

- 1) **Problem solving and innovation.** This is about how well we foresee and mitigate problems and how well we see problems through resolution. Ask yourself:
 - a) How well do I anticipate obstacles or challenges and identify opportunities for improvement or innovation in my work?
 - b) Do I seek the root causes of the problems I encounter?
 - c) Am I able to devise creative in-the-moment solutions and engage my supervisor in more systemic solutions?

- 2) **Personal effectiveness.** This focuses on skills in self-management and accountability. Ask yourself:
 - a) How well do I attend to my own needs and set boundaries?
 - b) How well do I own the work I do?
 - c) Do I consistently follow through on commitments made?
 - d) Do I take responsibility when I make mistakes and seek to learn from them?
 - e) How well do I respectfully hold others to account for the commitments they have made?

- 3) **Service orientation.** This is about how well we prioritize the client's needs while balancing organizational priorities and capacity. Ask yourself:
- a) Do I regularly try to understand my work from the client's point of view?
 - b) How often do I seek feedback from them and how do I incorporate their feedback?
 - c) How well do I manage difficult conversations or situations with clients?
 - d) How comfortable do I feel in making appropriate referrals?
- 4) **Working with others.** Working with others means that we are able to effectively collaborate within our team or perhaps across teams and with other stakeholders to achieve a goal. Ask yourself:
- a) How well do I develop and maintain rapport with my clients and team members?
 - b) How well do I seek out collaboration where it adds value either inviting stakeholders into the work that I'm doing or offering my expertise, time, and resources to others?
 - c) How well do I navigate team dynamics?
- 5) **Process excellence.** This is about the development and continuous improvement of institutional or local processes so that they are efficient and make sense to the client who is engaging them. Ask yourself:
- a) How well do I understand institutional and local unit processes from the client's point of view?
 - b) Have I given much thought to how the processes that I am part of could be simplified or streamlined?
 - c) Who would I need to engage in discussion about process improvements?



Activity 3.2: Role-Specific and Technical Skills

What **Role-Specific and Technical Skills** are required to meet and exceed your clients' needs and offer great service? *Remember that your clients' needs should inform the service you provide, and the service you provide should inform the skills and knowledge you draw on or develop.*

Now consider how confident are you in each of these areas:

1. In which of these areas would you consider yourself an expert? How can you share that expertise with members of your team?
2. In which areas do you have room to grow? What actions could you take to develop the skill further or expand your knowledge base?





Activity 3.3: Putting it all together

Consider a common service interaction that you regularly encounter using the service excellence competencies.

What is your common service interaction? _____

For example: A student has come to the Student Services Centre because they are not able to register for courses. We'll work through this example for the first competency to help you get started.

Problem-Solving and Innovation

1. How is this competency displayed during the service interaction?
*For example, there could be a variety of reasons that a student cannot register for courses, so you would need to display **problem-solving and innovation** to identify the possible reason(s).*
2. How you could improve future interactions by further developing or implementing these competencies.
*For example, developing your **problem-solving and innovation skills** could help you identify the reason(s) that a student could not register for classes more efficiently.*
3. What are some of the common problems you encounter when providing this service?
For example, the student has a financial hold on their account and will need to be referred elsewhere to resolve it, but they are worried that another student will take the last remaining seat in the class.
4. How do you determine the appropriate solutions for these problems when they arise?
For example, why is the student worried about registering for that specific course or section? How could you identify and address their underlying concerns?
5. How might you prevent this problem from arising in the first place? *Note: it may not be possible to prevent it entirely!*
For example, you likely wouldn't be able to prevent this from happening to other students, but what could you tell or show the student to help them understand how to avoid this issue in the future?

Personal Effectiveness

1. How is this competency displayed during the service interaction?
2. How you could improve future interactions by further developing or implementing these competencies.
3. How do you manage this service interaction in the context of your overall workload? How do you identify your priorities? What are your strategies for balancing competing priorities?
4. What mistakes have you made in the past when it comes to delivering this particular service, and how did you learn from it? What do you do differently now than when you first started delivering this service?
5. Do you regularly follow-through on your commitments that arise from delivering this service? For example, do you regularly follow-up if appropriate/needed?
6. How do you set appropriate boundaries while delivering this service?

Service Orientation

1. How is this competency displayed during the service interaction?
2. How you could improve future interactions by further developing or implementing these competencies.
3. What is the client feeling when they come to you for this particular service? How do you respect and accommodate those feelings?
4. How do you build rapport with your client when delivering the service?
5. How do you respond to challenging behaviour when delivering this service?
6. How can you be proactive when delivering this service? What are common “follow-up” inquiries that you receive from the client after this service is delivered and how can they be addressed in the moment?

Working with Others

1. How is this competency displayed during the service interaction?
2. How could you improve future interactions by further developing or implementing these competencies?
3. Who are the other stakeholders that need to be consulted when delivering this service?
4. Do you have strong relationships with these stakeholders already? If not, what could you do to improve these relationships and build trust?
5. Are there common referrals that occur when delivering this service? How do you conduct referrals to ensure a smooth hand-off?

Process Excellence

1. How is this competency displayed during the service interaction?
2. How you could improve future interactions by further developing or implementing these competencies.
3. Is there an established and documented process for the delivery of this service?
4. Are there currently any pain points in delivering this service?
5. How could the delivery of this service be improved? How could pain points be eliminated or reduced?
How could it be made more efficient?
6. What are the risks involved in delivering this service and how are they mitigated?

Role-Specific and Technical Skills
<ol style="list-style-type: none">1. How is this competency displayed during the service interaction?2. How could you improve future interactions by further developing or implementing these competencies?3. What computer systems and software do you need to use to provide this service?4. What specialized skills or knowledge are required to provide this service?5. Do you fully understand the end-to-end procedure for providing this service? Is anything unclear or do you have questions about any part of the process?6. Are there specific skills or knowledge you would like to develop or improve to deliver this service?



Activity 3.4: Service Excellence Self-Assessment

Complete the University of Alberta service excellence competency self-assessment, accessible from the [SETP eClass Resource Vault](#).

Upon completion, your self-assessment results will be sent to your direct supervisor/manager, along with recommendations for discussion.

Content Review

U of A Service Excellence Competencies:

1. **Role-Specific and Technical Skills:** the specialized knowledge, theory, methods, and practices needed to carry out the unique work assignments.
2. **Service Orientation:** demonstrated through genuine attentiveness to understanding and meeting client needs while balancing organizational priorities and capacities.
3. **Problem-solving and innovation:** involves anticipating opportunities and challenges, thinking critically, and taking the steps required to make good decisions and develop/implement innovative solutions.
4. **Personal effectiveness:** demonstrated through positive personal strategies for holding oneself accountable to commitments, actions, and behaviours and learning from them, even during difficult service interactions.
5. **Working with others:** requires working in a way that reflects an understanding of the interdependent and interconnected nature of the organization. This competency is reflected through working on and across teams and with internal and external stakeholders.
6. **Process Excellence:** involves the continuous improvement of how work is done by aligning people, tasks, processes, and technology to enhance efficiency and meet the end user's requirements.

Module 1 Conclusion

Reflection Questions

As you wrap up Module 1, consider the following questions and jot down a few responses. *We encourage you to bring these thoughts to the Live Application Session for Module 1 and/or discuss them with your team/manager!*

1. What is your key takeaway from this module? List 2-3 things that you can apply to your work immediately.
2. Do you anticipate any challenges when applying the material from this module to your work? If so, what might they be and how would you mitigate them?
3. Do you have any other questions or comments about the material covered in this section that you would like to discuss at the Live Application Session for Module 1?

Module 1: Additional Resources

Module 1 resource guides for staff and supervisors, available from [SETP eClass Resource Vault](#).

University of Alberta Service Excellence Competency Self-Assessment, available from the [SETP eClass Resource Vault](#)

University of Alberta for Tomorrow [Operating Model](#)

University of Alberta for Tomorrow [Service Culture Principles](#)

University of Alberta's [Business Process Mapping](#) course

Two self-paced learning videos are also available in LearnCentre to introduce the program and key concepts. The videos are only a teaser, but contain basic information on Business Process Mapping. Note: you will need to have a LearnCentre account to access these videos.

- [Introduction to Process Mapping Module 1: Introduction \(PART 1\)](#)
- [Introduction to Process Mapping Module 1: Introduction \(PART 2\)](#)

Resource 1.1: Sample Customer Questionnaire

*Adapted from Elevating Customer Service in Higher Education: A Practical Guide
by Heath Boice-Pardee, Emily Richardson, and Eileen Soisson.*

You may want to consider distributing a survey to your clients to understand what is important to them. These ten questions would be a great place to start:

1. Accuracy of information is more important than how fast I get an answer or response.

Disagree 1 2 3 4 5 Agree

2. I would prefer to get information:

- a. In-person
- b. Via email
- c. Via text
- d. Via phone

3. A personal connection with an office is important to me.

Disagree 1 2 3 4 5 Agree

4. I would prefer the following service hours (please circle all that apply):

- a. Early morning before 8:30 am
- b. 8:30 am to 4:30 pm (typical business hours)
- c. 4:30 pm to 7:30 pm



Remember, don't offer a choice that you're not prepared to offer.

5. When I email an office, a good response time would be:

- a. 1 hour
- b. 2-4 hours
- c. Within the same business day
- d. Within 24 hours
- e. Within a week (i.e., five business days)

6. What is one service that we don't currently provide that you wish we would?

7. Was there a time when our department or office didn't meet your expectations? We would like to hear about that experience:

8. How likely is it that you would recommend our department/office or services to another client?

Unlikely 1 2 3 4 5 Very Likely

9. How did you hear about our department or office? (Please circle all that apply):

- a. Word of mouth
- b. Poster/flyer
- c. Email
- d. Social media post (Twitter, Facebook)
- e. Website
- f. Other (please describe):

10. What else would you like us to know?

Resource 1.2: Observation Visit Guide

Adapted from Elevating Customer Service in Higher Education: A Practical Guide by Heath Boice-Pardee, Emily Richardson, and Eileen Soisson.

Conduct an observation visit to your physical office as if you were a client, and answer the following questions as you enter and move through the space:

1. Upon entering the office, the first thing I noticed was:
2. One aspect of the office that facilitates service is:
3. Aspects of the office that may be barriers to service include:
Consider the accessibility of your space and the placement of desks, computer monitors, shelving, etc.
4. The office makes me feel:

Module 2: Consistency, Efficiency, and Stress

Module Introduction

Now that we've defined service excellence, outlined our desired service culture, and discussed service excellence competencies, we can build upon that foundation and shift the focus to practical strategies for improving service work.

The content in Module 2 is essential for creating a respectful and supportive service culture and simple, standardized, and efficient processes that are reliably delivered and continuously improving. While all of the service competencies are on display with this module, the primary focus will be on problem-solving and innovation, personal effectiveness, and process excellence.

By the end of Module 2, you will:

- *Be familiar with strategies that can support service consistency across the University of Alberta;*
- *Understand how the effective and strategic use of tools such as FAQs can improve personal and team efficiency, and*
- *Be better equipped to manage and mitigate the impact of stress on teams.*

Exploration Questions

Before you begin Module 2, review the questions below and jot down a few thoughts for each. Keep these questions in mind as you work through the module.

- 1) Why are consistency and efficiency important when delivering *your* service?
- 2) What does consistent and efficient service *look* like? How can we tell when we are delivering consistent and efficient service? What are your current practices that contribute to consistency and efficiency in your work?
- 3) What stresses you out at work and how do you manage your stress?

Session 1: Service Consistency

Session 1 Activities



Activity 1.1: Creating Consistency

Make a list of some of the things you're currently doing to create consistency in the services delivered by your team:



Your list may include commonly used scripts, approaches to service, or ways that you share, document, and store information within your team.



Activity 1.2: Stakeholder Mapping

Which units regularly refer clients to you? Which other units do you regularly refer clients to?

We often refer our clients to	We often have clients referred to us by



This activity will help you to:

- 1) Identify the units you need to keep updated when there are changes to the services you offer, and*
- 2) Highlight the units that you need to maintain relationships with to refer and advise your clients properly.*



Activity 1.3: The Five Steps of Service

Consider the following questions regarding the 5 Steps of Service. *The 5 Steps of Service are also outlined in the [Session 1 Content Review](#).*

1. How does the model align with your current approach to service? Can you see the five steps in the service interactions that you have?

2. If you've identified something that you're not already doing, what are you potentially missing by "skipping" a step?

3. Are there strategies you use that are not reflected in this model? What are they? Why do you think they are important?



Activity 1.4: Think of a common service interaction that you experience in your area. Now, consider the 5 Steps of Service using the questions below:

1. Acknowledge the client
 - a. Do you always ask your client's name? Importantly, do you remember your client's name beyond the introduction and use it throughout the interaction?

- b. How do you show that you're listening and giving your client your full attention?

- 2. Clarify the situation
 - a. What kind of open-ended questions would help you elicit more information and what kind of close-ended questions will help you narrow down to the appropriate solution?

- 3. Take the heat
 - a. How do you know when you need to "take the heat"? What does this generally look like? How does this conversation usually go?

- 4. Meeting and exceeding the need
 - a. What could you do to exceed a client's expectations or create a "moment of magic"?

- 5. Confirm satisfaction
 - a. What do you do when a client tells you that they're not satisfied? How might you respond?



Activity 1.5: Scripting

If you're already using scripts, consider the following questions:

1. When was the last time your scripts were reviewed?
2. Do you have an established review process?
3. Are there any common service interactions you don't already have a script for?
4. Do you have any personal scripts that you could share across your team?



Take it Further: Reflecting on the material covered in Session 1: Service Consistency, make a plan for implementing **one** thing you could do to improve consistency in your service:

What is one thing that your team is not already doing that could increase service consistency?	
What information do you need to gather to implement this?	
How do you plan to gather this information? <i>For example: who do you need to consult? What resources will you reference?</i>	
Who will need to be involved in the approval and implementation process?	

Content Review

Service Consistency

Service consistency means:

1. Different clients will have a similar experience and be provided with the same information when accessing the same service, regardless of the staff member helping them;
2. When approached by clients on the same issue, different service units will similarly advise the client or refer appropriately; and
3. Clients can expect the same level of quality across all services on campus.

The Five Steps of Service

1. Acknowledge the Client:
 - *Greet your client with appropriate eye contact and positive body language, giving them your full attention to convey that they are important.*
 - *Introduce yourself and learn their name - be sure that you're pronouncing it properly, and use it throughout the interaction to develop rapport and show that you are listening.*
2. Clarify the Situation
 - *Ask probing questions with care and concern to understand the service inquiry fully.*
 - *Use open-ended questions and phrases like "tell me more about" to obtain information without prematurely narrowing the conversation. These can be helpful when the problem or request is unclear.*
 - *Use close-ended yes or no questions to help you to eliminate possibilities and to consider only the most appropriate solutions.*
3. Take the H.E.A.T.
 - *This model is used to manage difficult conversations. See below for more information!*
4. Meet and Exceed the Need
 - *Use your creativity to go above and beyond the service interaction.*
 - *Ask yourself, "how can I make this client feel valued in a way that is unique to them?"*
 - *Utilize the information learned throughout the conversation to provide outstanding service and create a memorable experience.*
5. Confirm Satisfaction
 - *Ask the client if there are outstanding issues they still need help with; for example, is there anything you need to explain again? Does the proposed solution make sense to them?*
 - *If there is nothing else to address, ask the client questions that generate feedback about their experience. For example, questions like "was everything clear?", "have your concerns been resolved?" or "is there anything we could have done better?"*

- *If necessary, clarify their feedback and thank them for offering it.*
- *Wrap up the conversation by summarizing what has been accomplished, and provide your name in case they need anything in the future.*

Taking the H.E.A.T.

Hear - Listen to the client so you can understand why they are upset, disappointed, or unsatisfied. Once they have finished sharing, paraphrase what you have heard and ask them if you correctly understand the situation.

Empathize - Use care and compassion to respond to what you have heard. You're not trying to solve the problem yet, and you might even disagree with their assessment of the situation.

Apologize and Ask - Apologize sincerely, not necessarily for the policy or the reality of the situation, but for the state that the person is in. Then ask the client how you can make the situation right.

Take Action - Own the problem until it is solved and avoid transferring it to someone else. The goal is to make the situation right.

Scripting

- Scripting can ensure greater consistency in the delivery of services and can be used for telephone, email, or in-person interactions.
- Scripts may be as simple as what to say when answering the phone or complex enough to outline specific questions to ask clients during a service interaction, followed by various answers, contingent on the client's responses.
- Scripts must be kept up-to-date, and appropriate stakeholders should be consulted when scripts are being created to ensure the accuracy of information.

Session 2: Service Efficiency

Session 2 Activities



Activity 1.1: Satisfaction with Efficiency

Think of a time when you received efficient service but weren't satisfied. What was the issue? How did the interaction make you feel?



Activity 1.2: Disney and Efficiency

When Walt Disney opened Disneyland in California, he established four values for service: efficiency, courtesy, safety, and show. Using the space provided, indicate how you think Walt Disney ranked their importance, and then the order that you would rank them.

Value	Disney's Rank	Your Rank
Efficiency		
Courtesy		
Safety		
Show		



Activity 1.3: Creating More Efficient Processes

Take a moment to consider a process or service that could be more efficient in your work and consider the following questions.

1. What is the process?

2. What specific part(s) of the process could be more efficient?
3. What would need to change to make this process or service more efficient? Is technology needed to make this process or service more efficient?
4. Who would need to be consulted to make these changes?
5. What are the risks of making this process or service more efficient? How could they be managed or avoided? What are the risks of leaving the process as it is?
6. If the process or service is client-facing, how can you ensure that you maintain a personal connection with the client?
7. What are the benefits to the clients? What are the benefits to you, the service provider?

Content Review

Service Efficiency

Efficiency means:

- Providing the user with service that requires the least effort on both sides
- Balancing speed and effectiveness with a focus on the client experience
- Working smarter, not harder

Creating and utilizing efficient strategies:

- Makes us more productive;
- Helps us streamline processes;
- Reduces “red-tape”;
- Allows us to serve a greater number of clients;
- Results in shorter wait times for clients; and
- Increases the amount of work that can be completed.

Downsides of excessive efficiency:

- Service providers feel rushed;
- Clients feel rushed;
- Increased time-pressure on service providers;
- Decreased quality of work, or an increase in mistakes; and
- Clients can feel like a transaction.

What do the experts say about service efficiency?

- Clients don’t always want the fastest service – they want attentive service
- When we prioritize the fastest, not the most thoughtful, solution, clients can feel that they aren’t being heard or understood.

Remember: Efficient service is not necessarily bad service, but excellent service is not always about doing things as quickly as possible. We must focus on our clients and look for appropriate times and places to be efficient, for example:

- Managing queues
- Making appointments
- Triaging inquiries

Strategies To Be More Efficient

Frequently Asked Questions Documents (FAQs)

- Should have client driven content: what are the questions that they are consistently asking?
- Should be accessible by your clients: Are they on the website? Could the link be provided in your email signature or voicemail message? Can you set an automated response on your email with the link?
- Should be updated regularly
- Should be easily navigated and categorized by topic

Warm referrals can help reduce the number of touchpoints that a client has and avoid the “University Shuffle” or “The Runaround.” The process for conducting a warm referral is as follows:

1. **Explain the Why:** why do you need to transfer the client
2. **Provide contact information:** your name and phone number, as well as the name and phone number of the person you’re connecting them to, in case they get disconnected.
3. **Ask permission:** ask for permission to make the transfer and allow the client a chance to ask any last questions. Place the client on hold.
4. **Provide information:** Share the information and details gathered with the service provider accepting the transfer. Ensure they understand the situation.
5. **Make the introduction:** If possible, return to the caller and introduce them to the service provider.
6. **Complete the transfer**

Other tools for increasing efficiency include

- Social media
- Online ticketing systems
- Online queuing systems
- Chatbots
- And more!

Session 3: Managing Team Stress

Session 3 Activities



Activity 1.1: Common Stressors

Please work through the questions below as you review the **Common Stressors** video:

1. Make a list of your common stressors in the workplace.
2. After you've completed your list, compare it to the list in the **Common Stressors** video (this list also appears in the [Session 2 Content Review](#)) and add any that apply to you.
3. Put an X next to the stressors over which you have a level of control.
4. Next to the stressor, write at least one action that you could take, big or small, for each of the stressors you have control over.

Your Common Stressors	Control?	Possible Action



Take it Further: Frontline Staff Survey

If you are in a frontline service role, complete the following survey and reflect on the challenges you experience in your position and potential ways to address the challenge or ask for support from your manager or supervisor.



If you are in a supervisory or managerial position, consider distributing the survey, or something similar, for an anonymous response from your team members.

1. What do you perceive to be the most significant challenges in your current position?

Circle all that apply.

- a. Sufficient training to do my job
- b. Physical office environment
- c. Managing difficult client behaviour in person
- d. Managing difficult client behaviour over the phone/email
- e. Micro-managing supervision
- f. Little direction/feedback
- g. Managing my own fear or emotions
- h. Difficult or uncomfortable office environment

2. What could your current supervisor do to offer more support? Circle all that apply.

- a. Offer more frequent feedback
- b. Offer less feedback
- c. Back me up
- d. Nothing
- e. Other (write your answer):

3. In what areas do you feel you need or want additional training?

- a. Technology
- b. Budgeting
- c. Legal issues
- d. Time management
- e. Mental health and available supporting
- f. Dealing with difficult clients
- g. Verbal communication
- h. Written communication
- i. Calendar/scheduling
- j. Support/helping skills

4. What is the part of your job that you enjoy most? Circle all that apply:
- a. Working with clients
 - b. Problem-solving
 - c. Scheduling appointments
 - d. Hours/schedule
 - e. Interaction/collaboration with other departments
 - f. Type of work
 - g. Other (write your answer):
5. What is one aspect of your current job description that you feel is incorrect or does not fit your position?

*This survey has been adapted from **Elevating Customer Service in Higher Education: A Practical Guide** by Heath Boice-Pardee, Emily Richardson, and Eileen Soisson.*

Content Review

Supporting Client-Facing Staff

Because client-facing staff are on the frontline and in extensive contact with clients, they can experience a variety of unique stressors, including:

- Navigating challenging and complex situations;
- Receive complaints;
- Managing intense client emotions;
- Diffusing conflict;
- Being privy to large amounts of sensitive information; and
- Acting as the “face” of the unit or the institution and being “on” all day.

What are some ways that managers and supervisors can support client-facing staff?

- Trust staff and back them up
- Shoulder the burden
- Share expectations with them
- Give them a break
- Maintain open communication
- Consider the physical environment

Common Stressors

The most common workplace stressors:

1. Workload
2. Feeling undervalued
3. Managing deadlines
4. Nature of your specific job
5. Taking on co-workers’ responsibilities
6. Disinterest in current position
7. Change
8. Long hours
9. Physical environment
10. Toxic workplace

Module 2 Conclusion

Reflection Questions

As you wrap up Module 2, consider the following questions and jot down a few responses. We encourage you to bring these thoughts to the Live Application Session for Module 2 and/or discuss them with your team/manager!

1. What is your key takeaway from this module? List 2-3 things that you can apply to your work immediately.
2. Do you anticipate any challenges when applying the material from this module to your work? If so, what might they be, and how would you mitigate them?
3. Do you have any other questions or comments about the material covered in this section that you would like to discuss at the Live Application Session for Module 2?

Module 2: Additional Resources

[Powerful Phrases for Effective Customer Service by Renee Evenson](#)

Module 1 resource guides for staff and supervisors, available from [SETP eClass Resource Vault](#).

University of Alberta's [Business Process Mapping](#) course

University of Alberta [Health and Wellbeing Resources for Employees](#)

University of Alberta [Workplace Skills](#) workshops

University of Alberta Health and Wellness Services

- [Employee Family Assistance Program \(EFAP\)](#)
- [Helping Individuals at Risk \(HIAR\)](#)
- [Office of Safe Disclosure and Human Rights](#)
- [University Health Centre](#)
- [Community Helpers Program](#)



Customer Service for Higher Education

SCRIPTING ACTIVITY



Why Use Scripting?

Scripting helps ensure the quality, consistency, and efficiency of your customer support. It can also help decrease your liability, build brand awareness, or be used to promote new service offerings.

But, while scripting can be an incredibly powerful tool, it has the potential to lead to employees sounding robotic or inauthentic. That's where good scripts, good training, and plenty of support come in handy!

Over the following few pages, you'll be walked through a handful of exercises to help you begin developing your own scripts for phone and email conversations, as well as tips for developing meaningful FAQs.

Phone Scripting

1. Greetings

Tips for scripting greetings:

1. Start off strong by using an upbeat opening to set positive tone.
2. Thank the customer for calling; communicate an appreciation for them calling YOU.
3. Personalize the conversation and create accountability by identifying who you are.
4. Ask the customer how they can be helped, and do so with a genuine tone and delivery.

Sample Greetings:

"Thank you for calling (XYZ College), this is (Eileen) with (Career Services). How may I help you today?"

"Good (Morning/afternoon/evening), this is Cara with PSU's Alumni Chapter in (Raleigh); how may I help you today?"

ACTIVITY: Create a sample script for a phone and an in-person greeting that would work for your department or area.

2. Apologies

Tips for scripting apologies:

1. Apologies must be sincere
2. Explain what happened and WHY
3. Acknowledge the customer's pain or inconvenience
4. Use empathy statements
5. Explain the future steps
6. Provide legitimate assurances

Sample Apology:

"I hear that you are upset and your frustration comes from not receiving a call back with the information about graduation. I sincerely apologize for that oversight and want to be sure you get the information you need right now. Let me know what you need to know and I will do my very best to get you the information you need right away."

"I apologize for the hold, we were speaking with our supervisor to be sure we had the correct information for your unique situation."

ACTIVITY: Create a sample phone and an in-person apology that would work for your department or area.



Customer Service for Higher Education

SCRIPTING ACTIVITIES

Phone Scripting Continued

3. Closings

Tips for scripting closings:

1. Recap what was accomplished
2. Explain what happens next
3. Ask if anything still needed before ending the call
4. Extend personal thank you using caller's name
5. Invite the caller to get in touch with future needs
6. End with courteous phrase

Sample Closing:

"Is there anything else I can assist you with today now that we have addressed your initial concern? No, thank you so much for calling Career Services and again, my name is Robert should you need anything in the future. Have a nice day"

"It has been a pleasure speaking with you, take care and be sure to visit campus soon!"

ACTIVITY: Create a sample phone and an in-person closing that would work for your department or area.

4. Transfers

Tips for scripting transfers:

1. Explain why you need to transfer the caller
2. Provide your information
3. Ask permission for hold/transfer, wait for answer
4. Pass on name, situation and conversation to the transfer
5. Make introduction
6. Complete transfer

Sample Transfer:

"I would be happy to transfer you to (Sally) in (Career Services); the reason I am sending you specifically to (Sally) is because (she oversees all the internships and would know exactly what employer paperwork you would need to complete to post an open management position with your business). (Sally's) extension is (x2686) should we get disconnected or you need to call her back in the near future."

ACTIVITY: Create a sample phone transfer that would work for your department or area.

6. Voicemail Greetings

Tips for scripting greetings:

1. Message should be professional and easy to understand.
2. Start with a greeting.
3. Then give a statement that explains why you're unable to take the call.
4. Include an invitation to leave a message.
5. Indicate your response time for getting back to the caller.
6. Provide an alternative means to get ahold of you or another person the caller can get ahold of in your absence (if applicable).

Sample Voicemail:

"Hello, this is Jake with University Recreation at Coastal Carolina University. I am currently working with someone or away from desk and unable to answer your call at this moment. Please leave me a message and I will get back to you when I return to my desk. Have a great day- and GO CHANTS!!"

ACTIVITY: Create a sample voicemail greeting that would work for your department or area.



Customer Service for Higher Education

SCRIPTING ACTIVITIES

Phone Scripting Continued

7. Voicemail Greetings

Tips for scripting greetings:

1. Message should be professional and easy to understand.
2. Start with a greeting.
3. Then give a statement that explains why you're unable to take the call.
4. Include an invitation to leave a message.
5. Indicate your response time for getting back to the caller.
6. Provide an alternative means to get ahold of you or another person the caller can get ahold of in your absence (if applicable).

Sample Voicemail:

"Hello, this is Jake with University Recreation at Coastal Carolina University. I am currently working with someone or away from desk and unable to answer your call at this moment. Please leave me a message and I will get back to you when I return to my desk. Have a great day- and GO CHANTS!!"

ACTIVITY: Create a sample voicemail greeting that would work for your department or area.

Email Scripting

Tips for email scripting:

1. Greet the customer
2. Thank them for reaching out
3. Summarize the situation
4. Answer the question/concern
5. Use tools to help explain and support- screenshots, step by step lists, links
6. Close with style and professionalism (double check your work)

Sample Email Script from the Office of Admissions and Merit Awards:

"(Insert name)

I am delighted to hear of your interest in Coastal Carolina University! CCU offers a number of exciting academic programs combined with a variety of student organizations and activities providing students with an experience that proves to be both academically stimulating and socially engaging.

We will open our application for the fall of 2018 this September. In the meantime, I would encourage you to schedule your visit to CCU's campus. We offer tours Monday through Friday at 9:30am. This September, we will also offer tours at 2:00pm. You can register at <http://www.coastal.edu/admissions/visits.html>.

Please let me know if you have any additional questions.

(Your name)"

ACTIVITY: Create a sample email script that would work for your department or area.



Customer Service for Higher Education

SCRIPTING ACTIVITIES

In-Person Scripting

1. Greetings

Tips for scripting greetings:

1. Be proactive so the customer does not feel like they are interrupting.
2. Provide a warm welcome with open body language.
3. Introduce yourself and area of the college you represent.
4. Offer any assistance and ask probing questions to clarify their need.
5. Use phrases that support the goal of making everyone feel welcome and included in your area of service.
6. Establish a rapport to personalize the greeting.
7. Remind them of your name (provide business card if applicable) and area in case they should need service again.

Sample Greetings:

"Welcome to ____!"

"Hi, Mr./Mrs. _____. It's great to see you again."

"I'm pleased to meet you." (When introduced to a customer)

"What can I help you with today?"

"Can I help you find something/someone in our office?"

"Hello, my name is Eileen. May I ask your name?"

ACTIVITY: Create a sample voicemail greeting that would work for your department or area.

Frequently Asked Questions & Answers

Tips for documenting FAQs:

1. What are the top 10 questions asked throughout the day?
2. How would you like those questions answered?

ACTIVITY: Brainstorm the top 10 questions that get asked and how you would like them answered.

Module 3: Challenging Service Interactions

Module Introduction

While it's likely that the majority of interactions you experience as a service provider will be relatively straightforward and uneventful, many will be challenging and complex. In these instances, providers must be equipped with the skills and knowledge to manage difficult conversations, de-escalate situations as needed, and escalate to a higher level of authority when appropriate. This module will discuss the conversation cycle and how it applies to service interactions, challenging conversations, de-escalation, and decision-making and escalation strategies. The skills and behaviours covered in this module will assist you in facilitating mutually beneficial outcomes and are essential for creating a service culture that is respectful, user-focused, and empowered.

By the end of Module 3, you should:

- *Understand effective communication with clients;*
- *Recall necessary strategies for managing challenging client behaviour; and*
- *Differentiate between situations that can be managed independently and situations that should be escalated to a higher level.*

Exploration Questions

Before you begin Module 3, review the questions below and jot down a few thoughts for each. Keep these questions in mind as you work through the module.

1. What types of service interactions do you dread having? Why?
2. How comfortable are you saying “no” during a service interaction?
3. What is your current strategy or process for de-escalating a difficult service interaction? How effective is it?
4. Does your team or unit have a formalized process for escalating concerns to a higher level?

Session 1: Active Listening and the Conversation Cycle

Session 1 Activities



Activity 1.1: Service Interactions and the Conversation Cycle

Consider a previous service interaction that did not go well and answer the following questions:

1. How do steps of the conversation cycle apply to this specific service interaction?
2. Were there steps of the cycle that were skipped or specific parts that could have been improved?
3. Were you able to complete multiple cycles or were you cut short prematurely?
4. What would you do differently now?



Activity 1.2: Service Interactions and Active Listening

Consider the last time you used active listening techniques in a service interaction:

1. Rate your use of active listening on the following scale:

Poor 1 2 3 4 5 Exceptional

2. How did your client respond to your approach?

3. What, if anything, would you do differently next time?



Activity 1.3: Conversation Cycle Scenarios

Pick one of the scenarios in the “Conversation Cycle Scenarios” (p. 56) and, with two of your colleagues, identify who will roleplay as the client, who will roleplay as the service provider, and who will take notes as the observer. *You can also come up with your own scenario that is applicable to your role.*

Spend 2-3 minutes (or as long as it takes) roleplaying the scenario using The Conversation Cycle (Inform, Invite, Listen, Acknowledge), repeating the cycle as many times as needed to resolve the service issue. Once you have finished, have the observer share their feedback and debrief as a group, considering the following questions:

1. What went well?
2. How could you replicate what went well in an actual service interaction?
3. What, if anything, did not go well?
4. What would you do differently in an actual service interaction?

When you’re finished, switch roles and do it again! Record any general observations you make about using the conversation cycle in the space provided.



The Conversation Cycle – Scenarios

Financial Aid Forgetfulness

Um, yeah, hi. My student advisor said I needed to come talk to you guys about my financial aid status. I'm afraid I'm not doing so well in one of my classes and I think my scholarship is dependent on my GPA but I'm not sure. I got a merit scholarship when I enrolled here at the beginning of my first year and I did ok that first semester but now I'm concerned that my statistics class is going to mess up my grades. I want to be a psychology major, so my advisor told me I have to take statistics. I took Algebra and Pre-Calculus in high school but that's it. I'm doing all my homework and studying and trying really hard in stats but I'm still struggling. I don't know what to do I went to the Registrar's office to see if I could drop the class—maybe I'll change my major—but they said the Drop/Add deadline was already passed.

I called my mom and she told me to go back and talk to my advisor again, so I did. I spent like an hour in her office going over everything and talking about some ideas for better study strategies and how to talk to my stats professor. She also gave me the number of the Center for Student Success, so I guess I could go there and try to get a tutor. But mostly I'm just worried about my scholarship because if this class messes up my GPA and I can't get my scholarship then I don't know what to do. Can you help me?



Parking Problems

Good afternoon. I'm a faculty member here and I've got an issue with a parking citation that I received. I've been teaching here for over 10 years, and I've never had this problem before. When the semester started and the new online parking registration website opened, I tried to register my car—it's a 4-door red Honda Civic—like I was supposed to. The website kept freezing on me, so I called you guys, this would've been about 5 weeks ago I guess, and talked to someone who said she entered me manually into the system and I'd receive my parking permit through intercampus mail in 5-7 days. So, I waited.

The permit never came and honestly, with the semester starting up and me teaching 4 classes plus my committee work I forgot about it. I've been parking in the slots reserved for faculty behind the auditorium since school started and I haven't received a ticket. I figured I was in the system even if I didn't have my sticker. So, this past Monday when I got out of class there was a citation on my car window for \$100.00 for improper parking. I called your office again and explained all this to the person that answers the phone (a guy for sure) and he told me I could appeal the ticket online and told me where to go.

I filled out the online appeal process but then this morning I got a notice that in appeal my ticket was reduced to \$50.00. I'm not trying to cause a problem, but I have tried repeatedly to get my parking sticker through the right channels, and this is now getting ridiculous. I do not want to pay this ticket since I did try to get my sticker. Could you please void this ticket and give me my sticker right now?

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Student Success

Hi, my name is Susan Ferris and I am calling because you are my advisor. I am having a serious issue with the schedule for fall that I registered for last spring when registration was open. I'm frustrated because since that time period 2 of my courses have had time changes, and one has been canceled. I only registered for 4 classes, that are each 4 credits, and so now I have only one course that works for my schedule.

See I work, in order to go to school, I have to put in 30 hours a week with my employer in downtown Philadelphia, BlueCross BlueShield. I work in the customer service department, and now the schedule I selected does not work if I have to change class times or courses. I have to be able to take classes on Monday through Thursday only, since I work Friday through Sunday.

I'm schedule to graduate in December, so this was to be my final semester. Everything I look at is full. I don't feel that I should be punished because of faculty changing time slots or courses being canceled. I was one of the first to register, and now it looks like I can't graduate, can't take the 16 credits I need and will have to take things that are going to conflict with my works schedule. Help!

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Admissions

Last month I contacted your office about a visit that was planned for our school's fall break. I'm still so concerned about traveling during this COVID-19 pandemic, and now my son's school has decided to change the calendar and cancel the official fall break so that we can finish by the end of November. So, I'm wondering whether we can come in early December?

It is critical that during this time we have appointments with faculty in the business division, the soccer coach, the financial aid department and also the disability office. There are so many questions that I don't want us to be part of a regular scheduled tour, but instead we need and want a private one.

Are you allowing students to stay overnight? I'm not sure how I feel about that, but my son does want to have the opportunity to see the dorms and talk with other students and experience student life. What is that like with COVID-19? He is my only child; I never went to college but have been doing a lot of reading and want to be sure this is the right place for him.

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Human Resources

Hi, I'm Jenny and I work in the athletics department. I'm here because I really need to better understand my benefits. My husband has recently lost his job due to the COVID-19 pandemic, so I need to see if I can get him added to my medical benefits. Meanwhile, we are in the middle of trying to get pregnant (please don't tell my boss) and I want to know exactly what is covered and how much time I can get off if I do get pregnant? What if I'm a high-risk pregnancy? How can I possibly work from home when I'm coaching women's basketball?

I'm really at a loss to figure this out, but it seemed like the right time, and I could be pregnant right now. I'm just too scared to find out, especially without my husband's income. Do we have a job here that he could have? I'm depending on you to figure this out for me.

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Payroll

My pay is screwed up, and I'm not sure how to get this fixed. We just finished completing our taxes for 2019 and determined that there weren't enough taxes taken out and now we had to pay a hefty bill. We have got to figure out how to do this.

I think it was in my paycheck, not my husband's. His amount of pay has been the same forever (ridiculous that he hasn't changed jobs since he hasn't gotten a pay increase in 3 years). I guess I should be thankful that he still has a job. So, it must be mine.

I teach, but also do overloads, I have a research grant which pays me money and I also get a stipend for being a department head. I just can't figure out what is causing the problem. I never feel like I'm making enough, so I take on different jobs, but now this tax thing is driving me crazy. I didn't bother to go to HR, just came here directly since you are responsible for my pay.

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Financial Services

Last month I contacted your office about a trip that I took for a conference in Quebec. You sent me the forms that I needed to fill out for reimbursement. I did that on February 12th, about a week after I returned. I attached the receipts I had and gave them to the dean of faculty for his signature. I know he signed them and sent them to you for payment. It is now March 12 and I haven't seen my money.

I promise I made sure on the form that the disbursement I received from you before I left was accounted for. But today, in my email I received a note from a rude employee (Melissa who must be yours) that I had not attached all of the receipts. I attached those that I had. I don't have the other ones, since I've never seen the policy regarding what is needed for reimbursement. I made sure I had the ones associated with the cash transactions, but it is hard to keep them all straight.

I really need the money before my credit card attaches fees for non-payment. What are you going to do about this?

Content Review

The Conversation Cycle

1. Inform: Provide appropriate information
2. Invite: Invite the client into the conversation
3. Listen: Actively listen to the client with the goal of understanding
4. Acknowledge: Indicate that you understand the client and/or their need, paraphrasing it back to them when appropriate to confirm your understanding is correct.

Repeat as needed until the service interaction is concluded.

Session 2: Challenging Conversations

Session 2 Activities



Activity 1.1: Managing Conflict

Consider your feelings around conflict and think about a specific moment of conflict you had with a client at work.

1. How comfortable were you in that moment of disagreement?
2. What was the key to managing the conflict in your mind?
3. What strategies did you use to resolve it, and how successful were they?
4. Thinking back on it now, what would you have done differently, if anything?
5. Overall, how might your approach to conflict affect how you provide service?



Activity 1.2: Delivering “No”

Choose a scenario from the “Delivering ‘No’ Scenarios” document (p. 65) that is relevant to you and, using the space provided, outline how you would respond. Once you’ve done this, you may want to discuss your answer with a colleague or your manager/supervisor.



You can also come up with your own scenario if none of the examples are relevant!

Delivering “No” and Other Bad News: *Management Scenarios*

Scenario 1:

You are the Director of Dining & Catering Services at your institution. Recently your department has been inundated by student requests for more varied meal options in the dining hall at dinnertime; however, your department has just undergone budget cuts and your capacity to fulfill this request is limited. How do you respond to the student community about this situation?

How would you say “no”?

Scenario 2:

You are the Dean of Students for your university. A student has been told “no” by one of your managers but isn’t happy with that answer and is demanding to see you immediately. The student wants to create a casino event for the senior class as a new activity on campus. This event is to include gambling and liquor for students that are 21 and older. However, as a religious affiliated school this is against the policies and values of the university. The student walks into your office to debate the “no” answer.

How would you say “no”?

Scenario 3:

An adult student comes to the Deans Office for Adult & Graduate students to complain about the lack of courses being offered during the evening in her program, on Tuesday nights. The Dean has an open door policy and she grants the student the right to come into her office. The student can’t understand how in the three years she has been enrolled for her associate degree that the courses she still needs have never been offered on Tuesday night when she is available. She wants to take the courses at another school in the area that offers them on Tuesday night and transfer them back to your institution. The difficulty is that she is only 4 courses shy of graduation, and this request is against the residency policy.

How would you say “no”?

Delivering “No” and Other Bad News: *Management Scenarios (Continued)*

Scenario 3:

You are the Director of Online learning for the university, which means overall responsibility for all undergraduate and graduate online degree program. There is a mandatory, 2-hour virtual orientation program that all students must complete before beginning classes through the online programs. A student emails your office seeking permission to bypass the orientation program because she has already taken one before as part of another online program offered through another institution. This does not strike you as a good enough reason to allow the student to bypass the orientation, so you are going to tell her no. How are you going to say it?

How would you say “no”?

Scenario 4:

The wife of an alumnus calls your office to establish a scholarship in her late husband’s name. It is a considerable sum but has a list of restrictions that she begins naming. You explain that she’ll need to meet with the Vice President of Advancement to arrange the scholarship, but she states “that person is an Igor – I should not have to work with them, I want to work with you.” You are the Director of Alumni, and the Vice President is your boss. You know that the VP will want to handle this scholarship due to the amount. How do you handle this call?

How would you say “no”?

Scenario 5:

You are the Director of Dining Services. You have just caught a student in your dining hall who is taking food from the buffet and loading it into two Tupperware containers that she has brought in with her. This is against dining services policy and you now need to approach the student and address the situation. How do you do this?

How would you say “no”?

Delivering “No” and Other Bad News: *Frontline Scenarios*

Scenario 1:

A student misses the add/drop deadline for courses by one week. It is your institution’s policy that, after that deadline, both the professor of the course and the student’s advisor need to sign off on the add/drop form before the student may drop the course. The student is now standing in front of you at the Registrar’s office asking to be allowed to drop the course without obtaining her professor’s signature. What do you do?

How would you say “no”?

Scenario 2:

A student is 10 minutes late for his advising appointment in the Center for Student Success with his general advisor which is you. So—assuming he wouldn’t show up—you went ahead and met with the next student in line. The late student then shows up and, upon hearing that you need to reschedule his appointment due to his lateness, grows frustrated and demands to meet with someone RIGHT NOW. What do you do?

How would you say “no”?

Scenario 3:

You work in the Bursar’s office. A student, whose parents live internationally, asks if she can pay her tuition bill via a money order. You can only accept credit cards and checks as forms of payment, so you must tell this student that a money order is not an option. How do you deliver this information?

How would you say “no”?

Delivering “No” and Other Bad News: *Frontline Scenarios (continued)*

Scenario 4:

A faculty member has arrived at the help desk, complaining that their desktop computer isn't working for them, and asking that you come to their office and replace the machine with a laptop today. All computers on campus are on a 4-year replacement cycle that is scheduled and approved by the dean of the school. The desktop is only one year old and replaced the laptop that the faculty member had broken multiple times in the previous cycle, thus the decision by the dean to order a desktop for the faculty member. How do you say no to his request today?

How would you say “no”?

Scenario 5:

It is Friday before classes start and you are a cashier at the University bookstore. Customer on the phone says: “I can't get a hold of anyone who will help! I need the Anatomy 210 book that is sold out and it needs to be expedited. I've tried calling and emailing, and no one is picking up! Classes start Monday! I need that book!” How do you tell the student it is not available?

How would you say “no”?

Scenario 6:

A newly admitted student to the university for the following fall has called the admissions office requesting the ability to come to campus late in the afternoon, stay overnight in the dorms, experience an athletic event and attend a class the following day. The date chosen falls on the Thursday prior to the Easter holiday and the university is closed on that Friday, and thus no classes are available and there are no athletic events being held. How do you as an admission counselor say no to this request without losing the student?

How would you say “no”?

Content Review

Saying “No” in Service Interactions

- Try to avoid a hard and unqualified “no,” but do not defer or draw out an inevitable “no.”
- Apologize as long as you’re not apologizing for a policy that you can’t change.
- Reiterate your intention to help.
- Ask questions to obtain more information and to show that you’re invested in helping to find a solution.
- Be transparent about the reasoning and do your best to explain the logic behind the “no.”
- Offer the best alternatives and explain what an alternate path to resolution or success could look like.

Reactions to “No”

- **Anger:** potentially because the client feels like they are not being heard or that they are being mistreated, due to stress, or because they think that it will result in action or them getting their way.
 - *How to respond:* it is best not to meet anger with anger; lower the volume of your voice as this will often be mirrored by the client and allow for a more productive conversation. This topic is explored in greater detail in Session 3: De-Escalating Difficult Client Interactions.
- **Sadness:** The client may feel like they have exhausted all of their options and are resigned to a poor outcome.
 - *How to respond:* in these situations, reiterate that you are there to help, ensure that the client is aware of all possible options, and, if it seems appropriate, connect them with University of Alberta mental health resources or other relevant supports.
- **Fear:** Can manifest as anger or sadness, but can also present as worry, for example, worry about the impact of the “no.”
 - *How to respond:* Confirm that the client accurately understands the repercussions of the “no.” Are the repercussions they are generating accurate? Who would know? Connect the client with people or resources that will help address their uncertainty.
- **Embarrassment:** Can manifest as defensiveness or anger and can be a complex emotion to manage in a service interaction as the client may not even be aware of it.
 - *How to respond:* Depending on the situation, it may be helpful to normalize the experience and acknowledge that the problem is difficult but not necessarily unique.
- Acknowledging your client’s emotions, no matter what they are, shows that you are in tune with how they’re feeling.

Choosing Your Words

- If you find yourself approaching frustration, anger, or resignation during a service interaction, consider the following strategies to regulate your emotional reaction:

- Find an appropriate way to pause or take a break from the conversation
 - Solicit the help of a colleague
 - Recommend reconvening with the client at another time
- After a difficult interaction, it's essential to decompress and process what happened so you can be ready for your next interaction.
 - Share your frustrations with your supervisor or colleague in private
 - Reflect on what occurred and what could be learned or done differently next time
 - If possible, take a break and try to get out of the office for a bit
- Possible trigger phrases to avoid:
 - "I understand how you feel..." *Instead*, you could say something like, "I recognize that this is difficult, and I've supported other clients in similar situations in the past"
 - "There's nothing I can do..." because even if you just listen and empathize with your client, that's **something**
 - "You need to..." *Instead*, try saying something like, "I would recommend ..." or, "the way to approach that is to..."

Session 3: De-Escalating Difficult Client Behaviour

Session 3 Activities



Activity 1.1: Difficult Client Behaviours

What client behaviours do you find challenging during service interactions?



Take it Further: After you've finished this session, revisit your list in **Activity 1.1** and write down how you would apply the de-escalation strategies outlined to each of these behaviours.

Content Review

Taking the H.E.A.T.: De-Escalation in Practice

Refer to [Module 2 Session 1 Content Review](#) for more information on Taking the H.E.A.T.

Hear the Client Out - Once you have the who, what, when, why, and how of the situation, you may need to find an appropriate time to interject and share what you have heard.

Empathize - Consider the following empathetic steps to ensure agitated or anxious clients feel safe and cared for.

1. Be understanding and pay attention to how your behaviour and tone communicate compassion and empathy.
2. Explain the hold-up.
3. Share the benefits of waiting and how the wait will produce better results. Addressing complexity and finding the best solution may take some time. We want to get it as "right" as possible to meet their needs.
4. Offer something to distract them. This could be a show of compassion and care - a glass of water, a place to sit, where the washrooms are. It could be asking a question about something unrelated that would enable bonding and reduce the focus on the stressful situation.
5. Make them feel special - you can do this by pulling them aside and providing an update "just wanted to let you know an advisor will be out momentarily for you."
6. Use humour- when appropriate.
7. Help them predict the length of waiting time.
8. Share your appreciation and thank them for their patience.

Apologize and Ask - Be sure that you don't jump to this step immediately as it's essential first to assess what you are apologizing for and include the ask so you don't spend time solving the wrong problem.

Take Action - Let the client know that their situation is important to you and that finding a resolution is your priority. Once the service interaction is concluded, document as appropriate.

When debriefing a complex or challenging service interaction, i.e., after "Taking the H.E.A.T.," consider discussing the following questions with your supervisor or manager:

- Did I get clarity on the client's needs?
- Was I able to meet and exceed the need? If not, could anything have been done differently?
- How did the interaction unfold and resolve? Did the client feel heard and respected? If your unit has one, this information could be drawn from a client experience survey if you have one already. If not, consider creating one!

- Is the situation an indicator of an issue with our process or procedures? What could be done to prevent this situation in the future?

Setting the Stage for De-Escalation

- **Ensure safety:** be aware of your surroundings and put safety first.
- **Create scripted responses:** create scripts for challenging everyday interactions.
- **Considering your waiting and hold practices:** narrate your problem-solving process and walk the client through what you're doing as you do it.
- **Ensure you have a formal escalation process:** this will be discussed more in the next session.

Session 4: Decision-Making and the Escalation Strategy

Session 4 Activities



Activity 1.1: Escalating Service Interactions

Reflect on a previous service interaction that you needed to escalate to a leader or supervisor and answer the following questions:

1. What happened?
2. Who did you involve?
3. How and when did you involve them?
4. Overall, how did it go?



Activity 1.2: Improving Escalation Processes

Consider the service interaction outlined in Activity 1.1 and consider the following questions:

1. Could the escalation process you followed be improved or streamlined in any way?
2. If this situation occurs again, do you know who is responsible? Who is accountable? Who needs to be consulted? Who needs to be informed?
3. Is there anything that could have been done to avoid the escalation? Could any processes or procedures be changed to prevent the situation in the future?

Content Review

Understanding When to Escalate the Situation

- **If requested:** Some clients may ask to speak specifically with a manager or higher authority. In this case, it is important for supervisors to back up their staff.
- **If the conversation cycle continues to circulate without progress:** after exhausting all appropriate options, if you decide you can't meet the client's needs and no common ground can be found.
- **If solutions exceed abilities:** for example, if the solution is beyond the service provider's level of authority.
- **The client becomes abusive:** you may also need to involve campus protective services.
- **If any threats are involved:** If a client is angry, shouting vulgarities or making physical or legal threats. You may need to involve campus protective services.

Escalation Processes and Strategies

- **Establish the best way to communicate when an escalation occurs:** consider factors such as urgency, the necessity for documentation, liability, etc.
- **Develop a tracking system:** to monitor the nature of complaints, patterns, seasonality, etc.
- **Train for common escalations:** It won't be possible to train for every situation, so having team conversations to ensure a clear understanding of general principles and limits of authority are very important.
- **Be consistent:** If a staff member sees that a supervisor often overrides established procedures or processes, they may be more likely to escalate every situation, even ones they could have handled; this may lengthen the service process unnecessarily.
- **Plan for warm hand-offs and referrals:** if you have to escalate, be sure your client understands why you are transferring them, and ensure that the manager/supervisor or other service provider understands the situation.
- **Act quickly and outline the process:** avoid keeping the client on hold or waiting too long, and make sure the client understands the escalation process.
- **Debrief:** learn from escalations to identify preventative strategies and ensure in-the-moment strategies are appropriate.

Module 3 Conclusion

Reflection Questions

1. What is your key takeaway from this module? List 2-3 things that you can apply to your work immediately.
2. Do you anticipate any challenges when applying the material from this module to your work? If so, what might they be, and how would you mitigate them?
3. Do you have any other questions or comments about the material covered in this section that you would like to discuss at the Live Application Session for Module 3?

Module 3: Additional Resources

Module 3 resource guides for staff and supervisors, available from [SETP eClass Resource Vault](#).

[Helping Individuals at Risk \(HIAR\)](#)

Appendix: Additional Program Resources

Powerful Phrases for Effective Customer Service

Over 700 Ready-to-Use
Phrases and Scripts
That Really Get Results

Renée Evenson

Excerpted from *Powerful Phrases for Effective Customer Service: Over 700 Ready-to-Use Phrases and Scripts That Really Get Results* by Renée Evenson.

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Communicating Powerful Phrases

Customer Service means finding the best solution for each customer, quickly, correctly, and with a helpful attitude.

The above goal might be easy to accomplish when you're handling those easy-to-satisfy, pleasant customers, but let's face it: Many customers are not easily satisfied. And they're not always pleasant. In fact, they're often hurried, stressed out, impatient, demanding, or downright rude; no one, it seems, has the time for all the niceties of interpersonal interaction anymore. We live in a society where instant gratification is the norm. Customers want service and they want it now. Not later, when it's convenient for you. NOW!

As a service provider, it's your job to give your customers great service, but you know that it's often difficult to do. Dealing with customers can be challenging. They may leave you feeling frustrated, stressed out, angry, or visibly upset. They can sometimes leave you scrambling for the right words to say. They will occasionally flabbergast you to the point where you go blank and can't think of an appropriate response. And there are times when you completely regret the words that have flown out of your mouth. Knowing what to say when handling different types of customer behaviors is anything but easy.

The truth is, the customer is *not* always right. But ... when you work in the service field, it's your job to be courteous, respectful, and helpful, even when those behaviors aren't exhibited by your customers. And, although customers may not always be right, it's their perception of good service that matters and it's their how they're being treated that's important to them. You only succeed at providing exceptional service when your customers believe they've received exceptional service.

What if you possessed the skills to handle the less than ideal behaviors that some customers, and, at times, even you may display? What if you knew how to quickly identify bad behavior and maintain control of the conversation? What if you knew the right words to say to diffuse any situation and professionally handle every customer to his or her satisfaction?

Using powerful phrases – the right words – when you communicate gives you the confidence that you're communicating your best. As a result, your customers' perceptions of service will be positive. It's all about the words you choose. What you say can make all the difference in how your customers view you and your company.

Starting every customer interaction with a welcoming phrase helps put your best foot forward. By speaking courteously, respectfully, and enthusiastically, you foster an open dialogue with your customers. Building a rapport and showing that you are interested helps to make every interaction go smoothly. When appropriate, adding powerful phrases that convey empathy or regret indicate that you are genuinely concerned and truly understand the other person's point of view. Ending every customer contact with powerful phrases of appreciation leaves a positive impression in any customer's mind.

As you read this chapter, you're going to learn helpful powerful phrases that will make every customer interaction end successfully, especially those that didn't start that way, whether it was

you or your customer who behaved badly. Make the use of powerful phrases a habit, a part of your everyday vocabulary, and you'll successfully handle every customer confidently and maintain control of any situation.

Don't Do This!

Linda is a receptionist in a physician's office. Her responsibilities include greeting and checking in patients, answering the phone, and scheduling appointments. The morning has been unusually stressful for her. Earlier, the doctor was called to the hospital to perform emergency surgery and is not running approximately an hour behind in seeing office patients.

While Linda was busy phoning patients to reschedule appointments affected by the delay, she was also dealing with patients in the waiting room, many of whom were becoming impatient. She was on a telephone call when she noticed that one of the patients who had been waiting almost an hour was standing at the window to the reception area. Linda did not make eye contact, but rather stared at her computer screen until she finished her phone call.

She slid the window open. "Yeah?" she asked, with no emotion showing on her face.

"I've been waiting almost an hour now," the patient responded. "Do you have any idea how long it's going to be?"

"I told you when you checked in that the doctor's running behind," Linda answered in an annoyed tone. "I have no idea how long it'll be. Do you want to wait or reschedule?"

"Well, I'm here. The same thing could happen next time. I have no choice but to wait," the patient replied, mocking Linda's annoyed tone. Linda slid the window closed and picked up the phone to call the next patient on her list.

Why This Doesn't Work

Linda's interaction with the patient didn't work because she didn't choose the correct words. Powerful phrases could have made all the difference! When she slid the window open, she said one word, Yeah?, in a tone that signaled she felt bothered. Linda could have used a powerful phrase that was welcoming, such as asking in an interested tone, *How may I help you?* which would have gotten the conversation off on a more positive note. When she failed to empathize with the patient about the lengthy wait and then spoke in a chastising manner, the patient became annoyed. Choosing powerful phrases that show regret or compassion, such as, *I understand that you've probably got other things to do today*, and then following up with a statement of appreciation, such as, *I appreciate your patience*, would have shown the patient that she cared.

Had Linda incorporated powerful phrases into the dialogue, she would have paved the way to a successful interaction. Linda's choice of words left the patient less than pleased, and she likely didn't feel very positive about their conversation either.

Phrases of Welcome

The first words that you say to customers can welcome them into your business, giving them a sense of warmth and friendliness, or they can make your customers feel so uncomfortable that they want to leave. The temperature of your words can either be warm and inviting or cold and unwelcoming. It's your choice. When you choose phrases of welcome, you open the door wide and increase your chances of successful customer interactions.

Sample Phrases of Welcome

Offering a warm welcome to your customers helps break the ice, helps your customers begin forming a positive impression of you, and helps to create an atmosphere of comfort.

- *“Hello!/Hi!”*
- *“Good morning/afternoon/evening!”*
- *“Welcome to ____!”*
- *“Thank you for calling _____. My name is _____.”*
- *“Hi, Mr./Mrs. _____. It’s great to see you again.”*
- *“I’m pleased to meet you.”* (When introduced to a customer)
- *“My name is _____.”* (Offer when appropriate)
- *“How may I help you?”*
- *“What can I help you with today?”*
- *“Can I help you find something?”*
- *“May I help you with that?”*

Incorporating Phrases of Welcome

Always be the first to greet your customers; they should never have to greet you first or ask for help. Offer a warm welcome to show your customers you’re happy they chose your business. Include in your welcoming phrase an offer to help. For example: *“Hi. Welcome to Pete’s Patio Shop! How can I help you today?”* If your company has a standard greeting, add a phrase of welcome to personalize the greeting. When you use these phrases and speak enthusiastically, it indicates your eagerness to help. Sound like you are truly interested in being of assistance. Show that you’re pleased the customer chose your business. Even when their demeanor or facial expression is less than congenial, it’s your job

to welcome them into your business and make them feel comfortable. Using phrases of welcome can improve even negative person's attitude.

Powerful Phrases Make the Difference

Phrase: You walk into a store and spot a clerk behind the counter. She looks at you, and asks in a bored tone, "Do you need anything?" You can't help but wonder why she bothered asking.

Powerful Phrase of Welcome: You walk into a store and spot a clerk behind the counter. She looks at you, smiles, and enthusiastically says, "*Hi! How are you?*"

You reply, "I'm doing great, thanks."

She smiles, nods, and asks, "*How may I help you today?*" You return the smile, feeling comfortable that you came into this store.

Phrases of Courtesy

After welcoming customers into your place of business, how you handle the remainder of your interaction indicates how you view your customers, as well as how you view yourself. Customers appreciate being treated courteously, so when you interject words and phrases of courtesy appropriately throughout your conversations, you show your customers how you respect them. Using phrases of courtesy can also help you promote a positive first impression and keep you on track to build a rapport with your customers. When you form the habit of using these phrases, they'll become a natural part of the vocabulary you consistently use.

Sample Phrases of Courtesy

Below are some examples of common courtesies that should be a part of your normal vocabulary with customers as well as with all others.

- *“Please.”*
- *“Thank you.”*
- *“You’re welcome.”*
- *“Excuse me/Pardon me”* (When you didn’t hear or when you need to ask the person to move.)
- *“I apologize. I didn’t hear/understand what you said,”* or *“I’m sorry, I need to pass by.”*
- *“Will you?”* rather than *“You will.”*
- *“Yes,”* rather than *“Yeah.”*
- *“Sir.”*
- *“Ma’am.”*
- *“I’ll check and be right back.”*
- *“Will you hold for a moment while I check on that?”*
- *“Thanks for waiting.”*
- *“Mr./Mrs./Ms. ____.”* (Address by first name only if you know that’s appropriate)

Incorporating Phrases of Courtesy

Using *please*, *thank you*, and *you’re welcome* shouldn’t need any explanation, yet it seems these words, especially *thank you*, are seldom used anymore. Your customers will appreciate hearing these courtesies and a heartfelt *thank you* will go a long way. When you don’t understand someone, *Huh?* will make your point, but saying *Pardon me*, *Excuse me*, or *I’m sorry, I didn’t hear what you said*,

comes across more professionally. Likewise, if you need to move by someone, prefacing your request with *Pardon me* or *Excuse me* indicates courtesy. Choose *yes* rather than *yeah* because it sounds better. *Sir* and *Ma'am* are signs of respect, but make sure to say them in a respectful rather than a condescending tone. When you need to leave the customer to check something or place the customer on hold, explain what you're doing. When you return, thank the customer for waiting. Lastly, people enjoy hearing their names, so if you know your customer's name, interject it into your conversation.

Powerful Phrases Make the Difference

Phrase: You're in a home improvement store and can't find what you're looking for. You ask an employee, "Do you carry electrical boxes?" The employee looks up and says, "Huh?" You repeat the question. He replies, "Yeah, they're in Aisle 2," then turns and walks away. You walk to Aisle 2 and, still having a problem locating what you need, wish the employee had shown you where to find them.

Powerful Phrase of Courtesy: You ask an employee, "Do you carry electrical boxes?" The employee looks up, smiles, and says apologetically, "*I'm sorry, I didn't hear what you asked.*" You repeat the question, to which he replies, "Yes, we do carry them. You'll find them in Aisle 2 next to the wiring supplies. In fact, I'm going that way. Why don't I show you where to find them?"

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