



# Delivering Exceptional Customer Service

Five Components of  
Exceptional Customer Service

## Instructor-Led Training Facilitator Guide

### **Training Description**

This customer service training takes approximately 90 minutes. It includes several knowledge checks and role-playing activities.

### **Course Outcomes**

1. Describe the five components of exceptional customer service.
2. Provide exceptional customer service during a role-playing scenario.

### **Materials and Equipment Needed**

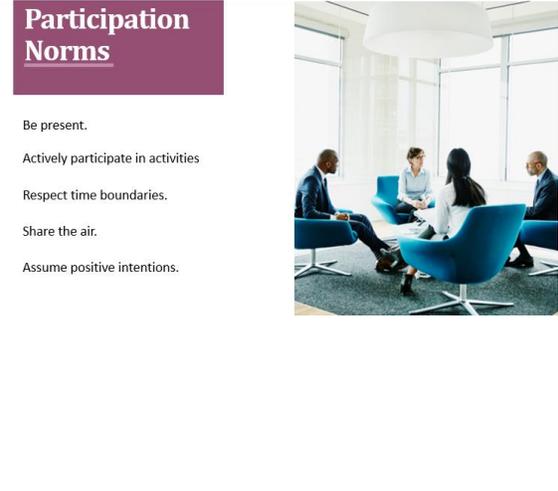
1. Exceptional Customer Service PowerPoint presentation
2. Computer
3. LCD Projector
4. Participant Guide

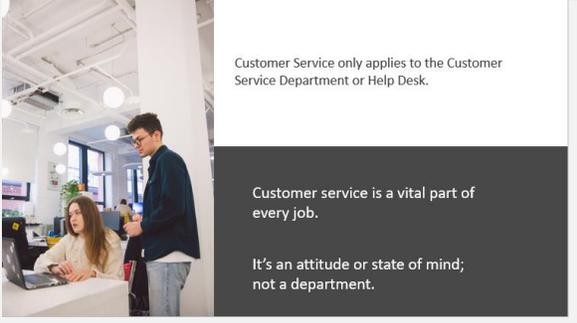
### **Lesson Outline**

1. Course Overview (10 minutes)
  - a. Personal Connection discussion
  - b. Welcome Participants
  - c. Trainer Introduction
  - d. Agenda
  - e. Norms
  - f. Outcomes
2. Five Components of Exceptional Customer Service (20 minutes)
  - a. Reliability
  - b. Timeliness
  - c. Competence
  - d. Empathy
  - e. Quality
3. Scenario Role Play (50 minutes)
4. Closure (10 minutes)

Lesson Content

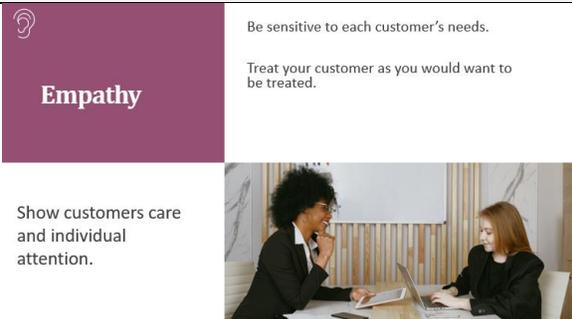
Course Overview (10 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
1 – Welcome and Trainer Introduction	<p><b>Display</b> slide as participants arrive.</p> <p><b>Welcome</b> participants to the training.</p> <p>Introduce yourself by providing your:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Position</li> <li>• Experience</li> </ul>	
2 – Personal Connection to the Topic	<p><b>Read</b> the first sentence and ask participants to think about the answers to the two questions.</p> <p><b>Provide</b> 30 seconds of think time.</p> <p><b>Ask</b> 3 participants to share their answer to the first question.</p> <p><b>Ask</b> 3 different participants to share their answer to the second question. arrive.</p>	
3- Agenda	<p><b>Direct</b> the participants to Page 1 of the printed Participant Guide.</p> <p><b>Describe</b> the session agenda, emphasizing that most of the time will be spent practicing and providing feedback.</p>	

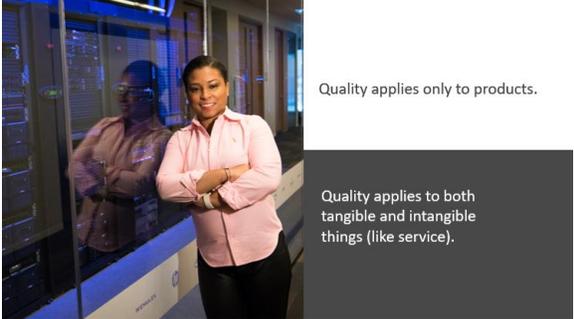
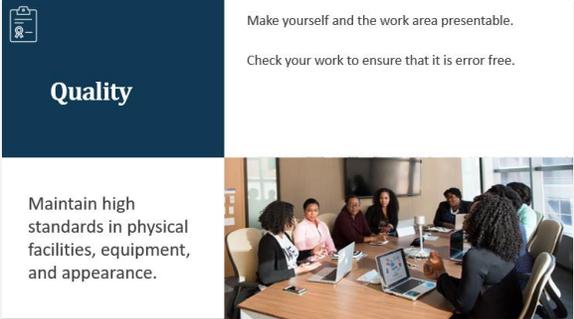
Course Overview (10 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
4 – Participation Norms	<p><b>Read</b> the participation norms.</p> <p><b>Ask</b> if there are any questions about the norms.</p> <p><b>Ask</b> if there are any additional norms that should be added.</p> <p>[Discuss and/or adjust as needed; participants can update any changes to the norms in their Participant Guide.]</p>	 <p><b>Participation Norms</b></p> <ul style="list-style-type: none"> <li>Be present.</li> <li>Actively participate in activities</li> <li>Respect time boundaries.</li> <li>Share the air.</li> <li>Assume positive intentions.</li> </ul>
5 – Learning Objectives	<p><b>Direct</b> participants to Page 2 of the Participant Guide.</p> <p><b>Say</b> “By the end of this training, you should be able to describe the five components of exceptional customer service and their characteristics.</p> <p>You should also be able to apply that learning to provide exceptional customer service during a role-playing scenario.”</p>	 <p><b>Objectives</b></p> <p><b>You should be able to:</b></p> <ul style="list-style-type: none"> <li>Describe the five components of exceptional customer service.</li> <li>Provide exceptional customer service during a role-playing scenario.</li> </ul>

Five Components of Exceptional Customer Service (20 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
6 – Elicit Understanding of Customer Service	<p><b>Ask</b> participants to silently decide whether they agree with the statement on the slide.</p> <p><b>Pause</b> for 15 seconds then ask them to share their answers with a neighbor.</p> <p><b>Provide</b> 60-90 seconds for the discussion.</p>	
7 – Customer Service Definition	<p><b>Explain</b> that many people think customer service is connected to a specific department or job title, but it's really a vital part of everyone's job and how they approach supporting internal and external stakeholders.</p> <p><b>Say</b> "When we use the term customer, we are including anyone who receives a service. This includes people within the organization, such as another department or leadership and it also includes people outside of the organization."</p>	
8 – Overview of the Five Components	<p><b>Direct</b> participants to Page 3 of the Participant Guide.</p> <p><b>Say</b> "Exceptional Customer Service is based on five key components. Today we will be learning about each component in more depth."</p> <p><b>Read</b> each component.</p> <p><b>Direct</b> participants to Page 4 of the Participant Guide.</p> <p><b>Say</b> "Please use the remaining pages of your Participant Guide to capture notes as we learn about each component."</p>	

Five Components of Exceptional Customer Service (20 minutes)		
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9 – Reliability	<p><b>Say “Reliability</b> is more than just being dependable. The key to being reliable is consistently delivering what you promised.</p> <ul style="list-style-type: none"> <li>• Be clear and realistic when making commitments to customers.</li> <li>• Work within your unit and across divisions to streamline and standardize procedures and communication.</li> <li>• Apologize when expectations are not met.</li> <li>• Make system adjustments to ensure the same mistake does not occur twice.</li> <li>• Problem solve to find and fix the root cause.</li> </ul> <p>Band-aid solutions don’t last, and cause frustration for you and our customers.”</p>	
10 - Timeliness	<p><b>Say “The key to timeliness</b> is the willingness to help customers promptly.</p> <p>There are several ways you are expected to do this.</p> <ul style="list-style-type: none"> <li>• Check phone and email messages at least 3 times per day.</li> <li>• Respond to phone calls and emails within 24 hours – sooner if the concern is urgent. This may include a message to let them know when you'll follow up with a detailed response.</li> </ul> <p>Be aware of your customers’ needs and establish realistic deadlines. Include customer</p>	

Five Components of Exceptional Customer Service (20 minutes)		
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	<p>input when establishing expectations.</p> <p>When deadlines are not or will not be met, be proactive. Keep customers informed and be sensitive to customers' need for urgency."</p>	
11 - Competence	<p><b>Say</b> "Customers want assurance that they have placed their request and /or need with a competent professional. Consistent, confident, and well-informed business interactions will demonstrate professionalism and <b>competence</b>.</p> <p>Become knowledgeable about the products and services offered by your unit and the organization. Work with your supervisor and team members to develop skills, knowledge and/or customer service resources to build competence. Remember, Competence = confidence!</p> <p>It isn't as important to know everything as it is to be willing to learn."</p>	
12 – Sympathy vs Empathy Prior Understanding	<p><b>Ask</b> participants to silently decide whether the statement on the slide is true or false.</p> <p><b>Pause</b> for 15 seconds then ask them to share their answers with a neighbor.</p> <p><b>Provide</b> 60-90 seconds for the discussion.</p>	

Five Components of Exceptional Customer Service (20 minutes)		
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13 – Sympathy Vs Empathy Definitions	<p><b>Explain that:</b> Sympathy is sharing the feelings of another. A sympathetic person becomes emotionally involved when dealing with an upset customer.</p> <p>Empathy is being able to relate to the feelings of another. An empathetic person recognizes that a customer is upset, but remains objective, enabling them to see all the perspectives for more effective problem-solving.</p>	 <p>Sympathy is the same as Empathy?</p> <p><b>False</b></p> <p>Sympathy is sharing the feelings of another.</p> <p>Empathy is relating to the feelings of another.</p>
14 - Empathy	<p><b>Say</b> “It’s important to acknowledge the situation and the feelings of the customer, but do not allow yourself to become emotionally involved.</p> <p>Maintaining a clear head enables you to focus on how to best resolve the issue.</p> <p>Try to put yourself in the shoes of the customer and ask yourself what would you expect if you were the customer?</p> <p>It’s ok to not know how to resolve the issue to satisfy the customer. Accept and encourage input from the customer when problem-solving and work to ensure the solution fulfills the customer’s needs.</p>	 <p><b>Empathy</b></p> <p>Be sensitive to each customer’s needs.</p> <p>Treat your customer as you would want to be treated.</p> <p>Show customers care and individual attention.</p>

Five Components of Exceptional Customer Service (20 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
15 -Quality Prior Understanding	<p><b>Ask</b> participants to silently decide whether they agree with the statement on the slide.</p> <p><b>Pause</b> for 15 seconds then ask them to share their answers with a neighbor.</p> <p><b>Provide</b> 60-90 seconds for the discussion.</p>	
16 – Quality Answer	<p><b>Explain that:</b> Quality applies to tangible items like specific products or deliverables, but it also applies to intangible things, like the service that you provide and how you interact.</p>	
17 - Quality	<p><b>Say</b> “Customers are increasingly discerning and demanding regarding expectations of service. Since service is an intangible commodity, it can be difficult to pin down to a specific measure.</p> <p>Maintaining a standard of high quality in every interaction creates a powerful reminder to the customer of the value that your unit provide and impacts their overall rating of your service.”</p>	
18 – Knowledge Check	<p><b>Say</b> “You just learned about the five key components of Exceptional Customer Service. How many do you remember?”</p> <p><b>Ask</b> participants to write their answer on a post-it note and then hold it up. [wait 30-90 seconds]</p>	<p><b>What are 5 components of Customer Service?</b></p> 

Five Components of Exceptional Customer Service (20 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
	<p><b>Review</b> the responses. C is the correct response.</p> <p>Based on answers, you may need to explain why other answers are incorrect.</p> <p>A: Sympathy should be empathy and price should be quality B: Attitude should be reliability D: Attitude should be quality and Sympathy should be empathy.</p>	
19 – Customer Reactions	<p><b>Say</b> “Let’s reflect on what we learned. Imagine a customer receiving exceptional customer service.</p> <p><b>Ask</b> participants to silently decide their answers to the two questions.</p> <p><b>Pause</b> for 30 seconds then ask them to share their answers with a neighbor.</p> <p><b>Provide</b> 2 minutes for the discussion.</p> <p><b>Ask</b> several participants to share qualities that they named.</p>	 <p>Imagine a customer receiving Exceptional Customer Service.</p> <p>How will they feel?</p> <p>What qualities will they remember?</p>

Scenario Role Play (50 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
20 – Role Play A	<p><b>Ask</b> participants to physically move into groups of three people.</p> <p>[If participants are not evenly divided into groups of three, make either one or two groups of two people; don't make a group of four people.]</p> <p><b>Ask</b> participants to number off in their groups from 1 to 3, so everyone has a unique number. If there are groups of two, the group will not have a person number three.</p> <p>Check to make sure everyone knows their number.</p> <ul style="list-style-type: none"> <li>• <b>Ask</b> person number 1 in each group to raise their hand. Tell them that they will play the <b>customer</b> role for this scenario.</li> <li>• <b>Ask</b> person number 2 in each group to raise their hand. Tell them that they will play the <b>employee</b> role for this scenario.</li> <li>• <b>Ask</b> person number 3 in each group to raise their hand. Tell them that they will play the observer role for this scenario.</li> </ul> <p><b>Explain</b> that the customer and employee will act out the scenario for 5 minutes, while the observer takes notes on page 6 of the Participant Guide, looking for the five components of exceptional customer service.</p>	 <p><b>DIRECTIONS:</b> Move into groups of 3 and assign each person a number. Person 1: Customer Person 2: Employee Person 3: Observer</p> <p><b>5 minutes:</b> Person 1 and Person 2 role play the scenario, while Person 3 observes and takes notes.</p> <p><b>5 minutes:</b> Person 3 provide feedback to partners. • Identify and label positive examples of the 5 characteristics. • Identify and label areas for growth.</p> <p><b>Role Play Scenario A</b></p>

Scenario Role Play (50 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
	<p>Hand out a copy of Scenario A and provide 1 minute for everyone to read.  <b>Set</b> a timer for 5 minutes.  <b>Tell</b> the groups to begin.  Once the 5 minutes is up, <b>set</b> a timer for 5 minutes.</p> <p><b>Tell</b> the groups that the observer will now provide feedback for five minutes, identifying positive examples and areas for growth. Everyone should use Page 6 of the Participant Guide to take notes.</p> <p>[Note: If the group only contains two people, there will not be an observer and both people in the scenario will try to point out positive examples and areas for growth.]</p> <p>Once the 5 minutes is up, ask one or two observers to share a summary of their observations with the whole group.</p>	
21- Role Play B	<p>Remind everyone to keep their same number.</p> <ul style="list-style-type: none"> <li>• <b>Ask</b> person number 2 in each group to raise their hand. Tell them that they will play the <b>customer</b> role for this scenario.</li> <li>• <b>Ask</b> person number 3 in each group to raise their hand. Tell them that they will play the <b>employee</b> role for this scenario.</li> <li>• <b>Ask</b> person number 1 in each group to raise their hand. Tell them that they will play the</li> </ul>	<p>DIRECTIONS:  Remain in your groups of 3 and keep your same number.</p> <p>Person 2: Customer  Person 3: Employee  Person 1: Observer</p> <p>5 minutes:  Person 2 and Person 3 role play the scenario, while Person 1 observes and takes notes.</p> <p>5 minutes:  Person 1 provide feedback to partners.</p> <ul style="list-style-type: none"> <li>• Identify and label positive examples of the 5 characteristics.</li> <li>• Identify and label areas for growth.</li> </ul>  <p><b>Role Play Scenario B</b></p>

Scenario Role Play (50 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
	<p>observer role for this scenario.</p> <p>[Note: If the group only contains two people, have person 1 and 2 switch roles for this scenario.]</p> <p><b>Explain</b> that the customer and employee will act out the scenario for 5 minutes, while the observer takes notes on page 7 of the Participant Guide, looking for the five components of exceptional customer service.</p> <p><b>Hand out</b> a copy of Scenario B and provide 1 minute for everyone to read.</p> <p><b>Set</b> a timer for 5 minutes. Tell the groups to begin. Once the 5 minutes is up, set a timer for 5 minutes.</p> <p><b>Tell</b> the groups that the observer will now provide feedback for five minutes, identifying positive examples and areas for growth.</p> <p>Everyone should use Page 7 of the Participant Guide to take notes.</p> <p>[Note: If the group only contains two people, there will not be an observer and both people in the scenario will try to point out positive examples and areas for growth.]</p> <p>Once the 5 minutes is up, ask one or two observers to share a summary of their observations with the whole group.</p>	

Scenario Role Play (50 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
22 – Role Play C	<p>Remind everyone to keep their same number.</p> <ul style="list-style-type: none"> <li>• <b>Ask</b> person number 3 in each group to raise their hand. Tell them that they will play the <b>customer</b> role for this scenario.</li> <li>• <b>Ask</b> person number 1 in each group to raise their hand. Tell them that they will play the <b>employee</b> role for this scenario.</li> <li>• <b>Ask</b> person number 2 in each group to raise their hand. Tell them that they will play the <b>observer</b> role for this scenario.</li> </ul> <p>[Note: If the group only contains two people, have person 1 and 2 switch roles for this scenario.]</p> <p><b>Explain</b> that the customer and employee will act out the scenario for 5 minutes, while the observer takes notes on page 7 of the Participant Guide, looking for the five components of exceptional customer service.</p> <p><b>Hand out</b> a copy of Scenario C and provide 1 minute for everyone to read.</p> <p><b>Set</b> a timer for 5 minutes. Tell the groups to begin. Once the 5 minutes is up, set a timer for 5 minutes.</p> <p><b>Tell</b> the groups that the observer will now provide feedback for five minutes, identifying positive examples and areas for growth.</p>	 <p><b>DIRECTIONS:</b> Remain in your groups of 3 and keep your same number.</p> <p>Person 3: Customer Person 1: Employee Person 2: Observer</p> <p><b>5 minutes:</b> Person 3 and Person 1 role play the scenario, while Person 2 observes and takes notes.</p> <p><b>5 minutes:</b> Person 2 provide feedback to partners.</p> <ul style="list-style-type: none"> <li>• Identify and label positive examples of the 5 characteristics.</li> <li>• Identify and label areas for growth.</li> </ul> <p><b>Role Play Scenario C</b></p>

Scenario Role Play (50 minutes)		
Slide Number and Topic	Facilitator Notes	Slide Image
	<p>Everyone should use Page 7 of the Participant Guide to take notes.</p> <p>[Note: If the group only contains two people, there will not be an observer and both people in the scenario will try to point out positive examples and areas for growth.]</p> <p>Once the 5 minutes is up, ask one or two observers to share a summary of their observations with the whole group.</p>	

**Course Overview (10 minutes)**

Slide Number and Topic	Facilitator Notes	Slide Image
<p>23 – Knowledge Check</p>	<p><b>Say</b> “You just learned about and practiced using the five key components of Exceptional Customer Service. How many do you remember?”</p> <p><b>Tell</b> participants that even though this slide looks similar to the one they saw before, they need to read the answers, since the choices aren’t all the same.</p> <p><b>Ask</b> participants to write their answer on a post-it note and then hold it up. [wait 30-90 seconds]</p> <p><b>Review</b> the responses. C is the correct response.</p> <p>Based on answers, you may need to explain why other answers are incorrect.</p> <p>A: Sympathy should be empathy and price should be quality                      B: Attitude should be reliability                      D: Attitude should be quality and Sympathy should be empathy.</p> <p><b>Ask</b> if there are any questions.</p>	 <p>The slide image shows a grid of four choices for the question 'What are 5 components of Customer Service?'. Each choice includes a list of components and a photo of a person.</p> <ul style="list-style-type: none"> <li><b>Choice A:</b> Competence, Sympathy, Price, Reliability, Timeliness. Photo: A woman with dark hair.</li> <li><b>Choice B:</b> Quality, Reliability, Timeliness, Competence, Empathy. Photo: A man with a beard.</li> <li><b>Choice C:</b> Empathy, Quality, Timeliness, Attitude, Competence. Photo: A man with glasses.</li> <li><b>Choice D:</b> Attitude, Competence, Reliability, Sympathy, Timeliness. Photo: An older man.</li> </ul>
<p>24 – Personal Reflection</p>	<p><b>Ask</b> participants to use the last section on page 7 of the Participant Notes to reflect on one action they can take right away.</p> <p><b>Provide</b> 1-2 minutes for participants to write their reflections.</p> <p><b>Ask</b> participants for any closing thoughts.</p> <p><b>Thank</b> participants and dismiss the course.</p>	 <p>The slide image features a purple vertical bar on the left with the text 'Personal Reflection' and a question: 'What is one action you can take to provide exceptional customer service?'. To the right is a photograph of a woman with blonde hair seen from behind, sitting at a table across from a man in a pink shirt who is looking at her.</p>