"THE BASICS"

Video Vignette Training Series

Leader's Guide

IMPORTANT

PLEASE READ

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Forward

Congratulations! Whether you have purchased one or all of the video based programs in this series, you have taken an important step toward improving performance in your organization. This *award winning* program has helped thousands of people, in many types of industries, to improve their performance and add value for their customers.

Maintaining a standard of performance with all employees continues to be a major challenge. The increased competitive pressures many of us face today often ask us to do "more with less" and call for short-sighted cuts in developing our employees' knowledge and skill levels. This series has been developed to quickly and cost effectively improve critical core skills that, if left undeveloped, may cost you sales, repeat business and referrals.

This guide provides you with some ideas for getting the most out of your investment in the programs. It contains guidelines, discussion questions and background information to help you simply and effectively communicate the learning points in the programs.

While these programs were designed to enhance performance even when there is little time and resources to train, we encourage you to take the time to review this Guide and explore ways, even if they are small, to get the most out of your investment in these tapes as well as your employees' investment of their time to experience this series. It is amazing the difference even a 15 minute chat session can make in the impact of the learning process.

The important thing is to USE this tool you have just acquired and USE IT SOON! Don't wait for the perfect time, or after you have "fully" prepared, or to have read more, or to have gotten buy in from 100% of the people in the organization.

Each day… each hour that goes by… when an employee could inadvertently leave a negative impression with a customer, or show a lack of cooperation, or doesn't ask the right question to help them grow… is a needless waste and potentially dangerous for your Organization.

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The Basis for these Programs

These programs were designed and produced based on an extensive research effort to find out what skills and performance levels were most often cited as the most desirable in entry level employees. Over a thousand surveys were sent out and hundreds of face-to-face interviews were done with customers and employers, from various industries, throughout the United States, Canada and the United Kingdom.

The results of the research told us customers and employers want employees to:

- **Be reliable**… consistently on time, with few or no absences.
- **Fit** into their culture.
- **Be flexible and willing** to take on tasks beyond what they were specifically hired to do.
- **Take the initiative**.
- **Resolve problems**.
- **Ask questions** to define their roles and ensure they know how to do their jobs.
- **Listen** in order to understand their business and the problems they face.

Today the care and concern companies deliver to their customers is critical for success. These videos will assist people in acquiring the basic skills needed to serve customers effectively.

Description of the Series

This training series currently consists of five independent modules. Each module has a video (described below) and a Viewer's Guide (described on page 7).

Following are the module titles with brief descriptions of their content:

Orientation to Quality Service - This video examines characteristics of providing good service to customers. It teaches the basic principles of effective customer service. The participant will learn why their behavior with customers makes a definitive difference in their company's business strategy as well as "how" to provide service to customers.

Exceeding Expectations - This video provides instruction to participants on how to go above and beyond when handling customer situations. It teaches the learner how to differentiate themselves from others when providing customer service and create positive memories for customers.

Solving Problems - This video shows the essentials of handling complaints or problems that customers have. The participant learns why the “recovery” process, in dealing with problems customers have, is an important step in creating customer loyalty. They will learn the do’s and don'ts of handling complaints.

Service on the Phone - As service quality has become more important; the way we communicate on the telephone has become a critical element in dealing with customers and each other. In this video participants will be introduced to a simple, but very effective model for effective telephone use. Participants will gain the skills to create a favorable impression on customers and coworkers as well as save everyone time.

Ask and Listen - When people take on new jobs or new assignments, performance can suffer while people grapple with the learning curve the new job presents. Orientation programs and training cannot provide a person with all the skills and abilities necessary to excel. This video will assist people in excelling at new jobs by teaching them techniques they can use to get up to speed fast. This program shows employees how to take initiative, shorten the learning curve and avoid costly mistakes.

All of the videos are **close-captioned** for the hearing impaired. Depending upon the type of television you have, either switch on open captions or install a box that opens the captions to allow them to be read by the viewer.

For the leader who wants to deliver this program without the use of the narrators, we offer the video tapes with the **vignettes only (no narration)**. To further facilitate custom use of these programs, you may also **license the rights** to edit, customize and reproduce the Viewers' Guide(s). In this case you would receive a master copy of the Viewer's Guide(s) on disk. Contact the organization you received this Guide from to order these options.

Viewer's Guides

Each video has an interactive Viewer's Guide created to lead the learner through the program. Each Guide is approximately 12 pages and includes:

- An introduction to the concepts;
- Questions that test the learner's understanding of the learning points;
- A short analysis of the answers provided, and
- A summary at the end.

While the videos would most likely stay the property of your organization, the Viewer’s Guides were created to be kept by the learner for future reference.

About the Vignettes

The video scenarios in these programs show a particular situation from two approaches. They are slightly different from some programs, in that the first approach is an average way of handling the particular situation (not poor, just not great). The second approach to the same situation offers a more effective way of handling the situation.

Our experience showed us that when contrasting methods of handling situations, if the less desirable approach is portrayed too poorly, the contrast with the better approach is over-simplified. It often disengages the learner because it is too easy to distinguish the differences, gets boring, doesn't challenge their thinking, and may even be offensive to their intelligence. Excellence is not gained when we evolve from poor to average. It results when we move from average to great. The scenarios in these programs allow the learner to pick up on more subtle, yet specific things that define great performance from average performance.

Why Scenario Learning?

This training program uses video scenarios for the purpose of analysis and prescription. Using scenarios for training allows learners to look at different situations and react both emotionally and intellectually to what they observe. The contrast of two different ways of handling the same situation allows the learner to both understand “why” a particular approach is more effective and “feel” the difference.

During Group Learning - Effective dialogue between learners results from different perspectives and opinions. This dialogue leads to better understanding of situations learners face and puts them in a position to make wiser choices when in similar situations. The ultimate purpose of this training is to stimulate diverse dialogue, which leads to understanding and learning. The role of the trainer or facilitator is to use these scenarios as a stimulant for participant dialogue.

During Individual Learning - For individual learning this training method allows the learner to commit to an analysis of a particular situation and then contrast that analysis with another version of the same situation. The participant materials are designed to ask pertinent questions to assist the learner in making a more effective analysis.

It is the contrast between the two approaches and the dialogue about the differences and implications of those differences that provides the learning.

Program Length

Each video program, including the workbook and discussion, can be completed in an average of 45 minutes. If you are facilitating groups it may take a little longer to allow time for dialogue, problem solving and creating improvement strategies.

While all five modules could be administered in a full-day session; these programs are designed to stand alone and allow for flexible administration. Taking an average of 45 minutes per module, you can design sessions from one hour to full day… everything in between.

Be creative! Think about fun ways to administer the modules before work, at lunch or after work. Consider having a continental breakfast and covering one module. Order pizza and complete a module over lunch. If you have a day when people come in to pick up pay checks, see if they could stay for 45 minutes to complete a module. Other suggestions are to quit working an hour early or start an hour late and do a module during that hour, or split the difference with 15 to 30 minutes of normal work hours and 15 to 30 minutes of after or before hours.

Methods of Instruction

These programs are designed to allow maximum flexibility in the delivery method that best fits your needs. Each video training segment can be administered in four different ways:

1. **Individual Self-paced** - An individual can take a program by him- or herself at the work location or at home.

2. **Group** - A group of employees can take a program together and use group dialogue to discuss the learning issues.

3. **Group with Leader** - A group of employees can take a program with a trainer, facilitator or manager present to guide discussions and enhance the learning process.

4. **Group with Leader without Video Narration** - If preferred, a video tape with only the vignettes on them can be requested instead of, or in addition to, the one with the narrators. This would be used by a trainer/facilitator who wants to deliver the content of the course themselves and only use the vignettes to help make points, show contrasts, etc. (See further description on page 7).

Before You Begin

Because these modules are designed to allow self-administration, benefits can be realized with **no preparation**. And while we strongly subscribe to the "Just Do It!" school of thought, following are some things you may do to enhance the impact these programs can have on employees and the organization.

Read -

- This Leader's Guide in its entirety.
- The Viewer's Guide(s) to the programs you will be administering.
- Books/articles (see Resources Section at the back of this book). These resources will be kept up to date on our website at http://www.Think-IT-Inc.com under our "Resources" button.

Gather Information -

The more you know about your organization's performance in the areas covered by the program you are going to administer, the more context you can add to the learning process. If you have information, make sure it is made available to as many people as possible. Without open sharing of performance and customer information, an organization cannot expect to create that all important "shared vision." Common sources for this information are from:

- Customer satisfaction surveys.
- Employee surveys and records.
- Letters of appreciation and complaint.
- Interviews with customers and employees.
- Competitor information.

View -

- The Video(s) you are going to administer.
- Other videos on the same subject matter (see resources list at the back of this book.)
- www.Think-IT-Inc.com for updated information, resources and links.

Check your systems - After you fully understand what these programs are promoting, check your organization's systems, structures, policies and procedures to make sure you are prepared to *walk* what the program(s) *talks.* You do not have to wait for full alignment of all of your practices with the philosophy or culture you want to work toward. In fact, these sessions can often serve to hasten change efforts if it is clear the change is desired and supported.

Market - The more you can make people *want* to go through these modules, the more they and your organization will get out of it. Take the time to fully explain what these programs are about, why you are offering them, and the potential benefits for the organization as well as the individuals. If there are any "non-negotiables" or "conditions of employment " behaviors described in these programs, make that clear as well.

Equipment and facilities - You will need a VHS VCR with monitor and remote if possible. The trainee(s) should have a quiet, comfortable, well-lit room with a table or desk for writing. If a group is taking the program together, a flip chart, overhead projector or other tools may be helpful.

Remember that preparation will always enhance the impact of a developmental tool like this. However, as discussed in the forward, procrastination in getting everyone aware of these “Basics,” may cost your organization more than you would gain by trying to be perfect.

Administering the Program(s)

When a trainer or facilitator is leading the learning process, begin each program by having participants read the short introduction at the beginning of the workbook. Then start the videotape. Each time the video tells you to stop and complete an exercise you have two choices:

1. Have the participants complete the exercise in the workbook, read the analysis on the page following the exercise and then discuss the exercise, or…

2. You ask the questions that are found in the exercise and have the participants answer verbally, get their reactions and discuss the issues. Please be aware that the first vignette in the videotape "Orientation to Quality Service" does not ask you to "stop the video" and does not have a reference in the Viewer's Guide. This vignette is for illustration purposes only.

After each video scenario and exercise ask questions like:

- What points was the video conveying in the scenario? (Look in the Viewer's Guide for assistance with learning points.)

- How could the situation be improved?

- Why was the second version of the scenario better? Could it be improved?

- How can you relate the issue to your life and to your work?

- How can you apply this learning to your job?

After the Program(s)

When these programs are taken by individuals alone, it is strongly suggested that leaders hold discussions after the program has been completed in order to reinforce the learning and help employees apply what they learned to the workplace. Make sure the short summary in the workbook is read after completing the course. Some questions that may assist in reinforcing the learning are:

- What were the most important points you learned in the program? (Look in the Viewer's Guide for assistance with learning points.)

- Why were these points important?

- Have you ever experienced situations similar to what you saw on the video?

- How do you plan to use what you have learned?

Use with Other Programs

Many people have had great success using the video scenarios in these programs with other customer service and employee orientation training programs. Since the service and new employee issues are generic and applicable to many different organizations, they are very compatible with other programs.

Simply use a relevant scenario in conjunction with the learning process of other programs and use the scenario learning process of observation, analysis and comparison to reinforce the learning points you wish to convey.

Testing

Different organizations have different requirements for testing and/or documentation of education efforts. Throughout the Viewer's Guides there are various sets of questions designed to test understanding and facilitate learning. To this end, the answers and a brief analysis of the answers follow each set of questions. If your organization requires another type of knowledge test, you may adjust these sections to meet your needs.

Recognition

While we have found that improving performance is the real motivator for taking these courses, some organizations like to have special recognitions and/or incentives for those who take the extra effort to improve themselves. As one possible tool, we have included at the back of this book, a master Certificate of Completion which may be locally reproduced and filled out for each person who successfully completes a Module. You may want to make a copy of the completed certificate for the employee's file. While framing these certificates may be cost prohibitive for your organization, if an individual has the type of workspace which would make displaying it possible, you may want to consider the internal marketing effect it may have.

Frequently Asked Questions (FAQ's)

Following is a list of FAQ's regarding the administration of these programs:

Who should get this training?

The content of most of the videos is basic enough that some employees may already have the knowledge and skills covered. However, just because someone is not a new employee does not mean they necessarily have the perspective these videos can give on issues such as Service, Quality and Initiative. The fact that they take such a short amount of time to administer might make it safer to recommend than not, if there is any doubt or signs that there is a knowledge or skill deficiency. If someone seems fully competent in the knowledge and skills presented in a module, don't waste their time or yours. Training for training sake does more harm than good. Remember… if the horse isn't thirsty, don't waste your time leading it to water.

When should an employee take these modules?

The earlier the better! Why set up an employee to "learn the hard way" or give your customers a bad impression when something as simple at this could have avoided it. Some of the modules are particularly helpful to **new hires** or as a part of your **Employee Orientation**. In fact, some organizations have shown some of the modules to **perspective employees** as a way to orient them to the culture of their company in an effort to avoid hiring individuals who don't share the values of their organization.

Is every module for everyone?

No. Obviously, if someone never uses a phone in the course of their job, then the module on telephone skills would not be professionally helpful to them. Don't be fooled however, by a narrow view of what competencies will help who in your organization. The real goal is to give as many people as possible the information, tools, and perspective to create ways to *add value* to your customers' experience. For instance, the module "Orientation to Quality Service" isn't just for people who serve your customers directly. It includes a lot of information about cooperation, teamwork and building better systems to better serve the customer.

Is there a best order to administer the modules?

Not really. This will really depend on your organization, the job the employee is in, and even the individual. Some have the opinion that "Orientation to Quality Service" sets a stage for integrating someone into their culture and that "Ask and Listen" teaches critical skills and knowledge for new hires. We would suggest that anyone who is going to recommend someone take these, that they view them first to better decide which ones and in what order would be best.

Is it better to administer these individually or in groups?

Our bias is that the more dialogue one can have about issues, the more meaningful and impactful the learning will be. In fact, because customers are served cross-functionally, some of the best results have been with intact work groups (including leaders), going through the modules together with time built in to critically explore where their own organization could improve in these areas. Obviously, you need an environment of trust and open communication for this to work, but the payoffs are great. We have even heard of some organizations including their customers in some of these sessions. This would be the case where that relationship is very much a "partnership."

What is the ideal size of a training group?

Again, this depends a lot on what fits best with your organization. There is a general rule of thumb that if you want a lot of dialog and interaction, you want the size to be somewhere between 8 and 15. However, we have seen very lively and productive sessions with groups of 5 and 25.

With regard to the last two questions… DO WHAT YOU CAN! Use common sense. Minimize any negative effect on the organization and the individuals. (e.g. Don't ask a sales person on the last day of his production period to take time away from trying to meet or exceed quota to take a module. Don't ask the accounting department to meet to redesign their systems to be more customer friendly while they are trying to close the books. Don't shut the Service Center down so that everyone can go to an all day retreat.)

The final word on this is *Return on Investment* (ROI). You must be realistic and keep in mind real world issues such as what you can gain from what kind of sessions; which ones fit your operational obligations, logistics, geographic location of everyone; and of course, WHAT IS BEST FOR YOUR PAYING CUSTOMER. Nothing is sillier than to call a company to get some service and be told, "I'm sorry, no one can help you… They are ALL in a Customer Service class."

In Closing

Thank you for choosing this product. We know you have limited resources and many, many choices. We're confident this program can help differentiate your organization from your competition and we look forward to partnering with you toward improving the performance of your workforce.

Please send us your success stories, learnings and other feedback from your implementation of this series so that we may learn from them and share them with everyone. Can you imagine how helpful we can all be to each other and how successful we will be making in improvements one step at a time? We hope to be adding modules to this series and would value your input. Once again, our e-mail address is ThinkIT@Home.com.

Selected Readings

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Additional Resources

Frontline Service Videotapes (5)
Frontline Service Slides and Guide
Frontline Service Facilitator Guide
Frontline Service Game Plan

Legendary Service Videotapes (3)
Legendary Service Overview
Legendary Service Facilitator Guide
Legendary Service Slides and Guide
Legendary Service Participant Workbook
Legendary Service Game Plan
Legendary Service Audiotape set

Service Leadership Facilitator Guide
Service Leadership Participant Workbook

“Service Perspective: Focus the Frontline” – Videotape
“Monkey Business: The Key to Service Excellence” – Videotape
“Leadership and the Customer Revolution” – Book
“Leadership Development Survey and Feedback Guide” – Instrument