

A TEAM-BASED APPROACH TO THE DESIGN AND DEVELOPMENT OF A  
CUSTOMER SERVICE TRAINING PROGRAM FOR DESERET MUTUAL  
BENEFIT ADMINISTRATORS

by

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A project submitted to the faculty of

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in partial fulfillment of the requirements for the degree of

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As chair of the candidates' graduate committee, I have read the project of Stephen D. Evans, Meghan M. Kennedy, and Donna M. Ure in its final form and have found that (1) its format, citations, and bibliographical style are consistent and acceptable and fulfill university and department style requirements; (2) its illustrative materials including figures, tables, and charts are in place; and (3) the final manuscript is satisfactory to the graduate committee and is ready for submission to the university library.

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## ABSTRACT

# A TEAM-BASED APPROACH TO THE DESIGN AND DEVELOPMENT OF A CUSTOMER SERVICE TRAINING PROGRAM FOR DESERET MUTUAL BENEFIT ADMINISTRATORS

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This report describes the design and development processes used in creating a customer service training program for Deseret Mutual Benefit Administrators (DMBA) by three Instructional Psychology and Technology graduate students from Brigham Young University (the BYU design team). This paper reviews both the product and the process of developing the product. It

also contains a formative evaluation of the product and provides a summative evaluation plan to be utilized by DMBA trainers once the product is fully implemented. The strengths and weaknesses of the training program are critiqued and recommendations for improvement are made. Finally, BYU design team members describe their unique contributions throughout this project and individually critique the process and experience.

## ACKNOWLEDGMENTS

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Introduction

Deseret Mutual Benefit Administrators (DMBA), a small company with approximately 300 employees located in Salt Lake City, Utah, provides benefits and insurance to a diverse customer base. DMBA's customers include employees and missionaries of the Church of Jesus Christ of Latter-day Saints, employees and students at colleges and universities owned and operated by the Church of Jesus Christ of Latter-day Saints, and employees of various Church-owned commercial businesses.

In order to effectively serve their customers, DMBA management has divided company operations into several departments. These departments include life insurance, retirement, savings, medical insurance, membership, operations, overpayments, and missionary medical. Prior to 2003, department trainers at DMBA were responsible for identifying specific training needs and had the sole responsibility of creating and providing training courses within their individual departments. This strategy resulted in a fragmented training curriculum and redundant training programs between departments. In an effort

to improve and standardize training programs, DMBA management formed a new training team in the summer of 2003 consisting of trainers from each department.

### *Project Rationale*

DMBA trainers determined to begin the standardization process by selecting a single training program to implement simultaneously in all departments. DMBA trainers wanted to affect as many employees as possible with the new program, so they looked for a training topic with universal appeal; one that would impact services and procedures in multiple departments. DMBA trainers selected customer service as the topic of their pilot training program, since nearly all DMBA employees must utilize customer service skills in their daily tasks.

Once DMBA trainers identified customer service training as their pilot program, they had to determine what content to include in the program. The trainers felt strongly that any customer service training program should incorporate their company philosophy and core values. They also wanted the ability to adapt and personalize the training to meet their organization's unique needs.

As a team, the DMBA trainers reviewed many training packages and other existing customer service materials. However, they did not feel that any of

these materials fully covered the content they wanted to address or could be adapted to meet their needs. Therefore, DMBA trainers opted to develop their own, personalized customer service training program.

In conjunction with this training program, the trainers desired to create standardized templates and processes that could be used to develop future training programs. They realized that these templates, if they incorporated principles of sound instructional strategies, could be used to develop many future training courses.

DMBA management understood the importance of involving the DMBA training team in the creation of this new customer service training program. Managers knew that trainer involvement would create a strong feeling of ownership throughout the company and would ensure that the training included appropriate content. DMBA's training team included subject matter experts qualified to provide content for a customer service training program; however, it lacked instructional design experts who had the resources and experiences needed to integrate instructional strategies and design a quality customer service program and global templates. Therefore, DMBA's training team requested outside assistance from a group of Instructional Psychology and Technology graduate students from Brigham Young University.

### *The BYU Design Team*

The students; Stephen Evans, Meghan Kennedy, and Donna Ure; henceforth known as the BYU design team; were contracted to work with DMBA's training team to create the customer service training program. Each member of the BYU design team had previously completed one year of graduate school. They had studied principles of instructional design, learning theory, project management, and evaluation. They also worked closely with their faculty advisor, Dr. Stephanie Allen, who provided insights into the design and development processes used on this project.

### *The Role of the BYU Design Team*

The primary role of the BYU design team was to work with DMBA trainers to determine what topics the customer service training program should cover and how the contents should be arranged and presented to the employees. As part of this role, the BYU team designed the global templates for the content development and presentation of the training program.

As a secondary role, the head of the DMBA training team asked the BYU design team to help educate DMBA trainers about the underlying instructional design processes used in the development of the training program. She knew that her team needed to understand the instructional design processes in order to recognize the steps to follow when developing future training projects.

### *Purposes of the Customer Service Training Program*

As the BYU design team worked in these roles, they defined several key purposes of the customer service training program from DMBA trainers and executives. These include

- Improve employees' customer service skills
- Increase customer satisfaction
- Standardize customer service policies and procedures

Each purpose is described below.

*Improve employees' customer service skills.* DMBA's management and training team wanted the customer service training program to provide new employees with an overall introduction and orientation to DMBA's customer service philosophy and the customer service skills they would need to succeed on the job. The trainers also desired to provide existing employees with an opportunity to review, at any time, specific customer service skills they may be struggling with. DMBA trainers hoped to improve such skills as phone etiquette, listening skills, and how to handle difficult customers.

*Increase customer satisfaction.* DMBA executives and trainers hoped to increase their customers' overall satisfaction with the service they received. Michael Stapely, the President of DMBA, wanted all their customers to have a "wow" experience that left them impressed. By providing a consistently

impressive customer service experience, DMBA's management expected to improve DMBA's reputation for quality customer care and relationships.

*Standardize customer service policies and procedures.* DMBA's training team and management had an overarching goal to standardize customer service policies and procedures across all organizational departments. Standardization would result in more effective and efficient customer service operations. Because many customer service skills (e.g., basic phone etiquette, anger diffusion, etc.) were transferable across departments, standardizing the customer service training would cut down on development and delivery time and costs by allowing one training program to be used by all departments. Having one standardized training program would also ensure that customer service representatives throughout the organization dealt with customers consistently.

#### *Customer Service Training Program Overview*

To meet these purposes, the BYU team designed a blended learning solution for the customer service training program. The instructional solution includes one instructor-led unit, eight web-based units with suggested instructor-led activities, and an orientation to the web-based units. The instructor-led "welcome" unit serves as an introduction to the training program and is designed to last approximately two hours. Each web-based unit is



designed to take approximately 20 minutes to complete while the orientation lasts approximately five minutes.

Instructor-led activities were also developed and recommended for use with each of the eight web-based units in order to give DMBA trainers the opportunity to reinforce skills and techniques presented in these units. The activities are designed to be conducted in individual department meetings so DMBA trainers can personalize the content of the web-based units to meet the employees' unique needs and customer bases.

Designing a blended learning solution for the customer service training program most appropriately addressed the needs of DMBA trainers and employees. By blending web-based and instructor-led components and integrating a variety of learning strategies within both delivery modalities, the BYU design team created a standardized training program that supported the needs of the DMBA customer service representatives and maximized comprehension and application of the material presented.

#### *Audience*

The primary audience for the customer service training program is all DMBA customer service representatives. A secondary audience is all DMBA employees. After completing the course, all employees will be able to review

units over the company intranet as desired or as deemed necessary by their department trainers.

## Literature Review

In order to design an effective customer service training program, the BYU design team conducted a thorough literature review. The following section presents their findings from reviewing literature on instructional theory, instructional materials, and customer service as a subject matter. They first reviewed literature on instructional theory, which yielded instructional strategies that provided backing for the delivery medium and design of the program. Second, they reviewed instructional materials and customer service content sources, which provided the team with additional strategy examples and guided their creation of the content for the training program.

### *Instructional Theory Review*

According to Osguthorpe (1985), the intent of a theory review is to “provide perspective advice to the designer” (p. 21). He also suggested focusing on literature that pertained to particular delivery systems and specific categories of learning. Each of these areas is discussed below.

*Delivery systems.* Prior to reviewing theories pertaining to delivery systems, the BYU design team had decided to design a blended learning solution for the customer service training program. Web-based training was chosen to be the primary delivery medium for the customer service training program based on the aforementioned need for standardization. Also, instructor-led

components were designed to include various group activities in order to offer employees ample opportunities to practice what they would learn by interacting with other employees in a context specific and applicable to their jobs. Reviews of the following theories and concepts provided support for these decisions.

Experts in instructional design and training suggest using web or computer-based training programs when there is a need for learners to be self-directed, when there is a large training population, and when a particular training program will be repeated often. Web or computer-based training is also suggested when people will enter a training program with varying degrees of skills and knowledge and when training needs to be standardized throughout a company or organization (Harrison, 1999; Piskurich, 1999).

The rationale for including interactive instructor-led components in the training program is founded in constructivism and situated cognition. Constructivism focuses on learner interactions and asserts that learners construct knowledge as they interact with the world, strive to make sense of their experiences, and seek meaning. Constructivists maintain that knowledge doesn't exist independently from social interactions (Driscoll, 2000). Instead, learning results from interactions with individuals' environments and with others.

Situated cognition includes ideas such as learning communities, anchored instruction, and cognitive apprenticeships (Driscoll, 2000). Adherents of these

theories of instruction believe there is an advantage to learning through instructor-led modeling and problem solving. As an example of this approach, Schank (1992) stated “The goal of effective training must be to repeat as well as possible the breadth of experience an employee needs. . . . Training should look and feel more like the job that one is being trained for than the job itself” (p. 8).

Blending web-based training with instructor-led components aimed at learner interaction provides DMBA trainers with a program that is self-paced, consistent, and standardized. It also provides DMBA employees with the basic skills and interactive, real-world experiences they need to effectively learn and complete their daily tasks.

*Specific categories of learning.* Once the delivery format was decided, another search of instructional theory provided guidance in choosing which strategies should be included in the presentation of the program’s content in order to maximize learning. The principles behind Criterion Referenced Instruction (CRI) and Component Display Theory (CDT) guided the choice of learning strategies that the BYU design team used when presenting the material. These theories recommend using scenarios, feedback, activities, and example/non-example pairs to create an optimal learning environment (Mager, 2004; Merrill, 2004). The BYU design team integrated these strategies into both

the web-based and instructor-led components of the customer service training program.

Principles of the CRI model developed by Mager (2004) provided a framework for the customer service training program methodology. The CRI model requires that instructional materials identify what needs to be learned, specify the task to be learned, and evaluate learning through learning modules tied to specific stated objectives.

Models of CRI-based instruction tend to be self-paced and utilize a variety of different media to reach learners. These models focus on performance-oriented instruction, which is teaching through integration of activities, examples, and scenarios. CRI supports learners' abilities to choose the order in which they complete learning units and allows the learners' to assess their own mastery of content through assessments.

Using CDT achieves and facilitates the learning of preferred outcomes consistent with set objectives (Anderton, Parry, & Twitchell, 1990). By providing examples or opportunities to practice along with relevant feedback, learners receive information in two different forms. Viewing information in different ways increases learning effectiveness. Scenarios, role plays, activities, and example/non-example pairs are all ways to view information that illustrate differences between successful and unsuccessful applications of presented

material (Merrill, 2004; Schank, 1992). They provide learners with opportunities to apply the material to a realistic situation while reinforcing good decisions.

Activities can be used as an opportunity to practice and refine skills or review information that has previously been presented. They provide repetitive reinforcement for learners and help them shift from memorization to application of material and take control of their learning (Merrill, 2004; Schank, 1992).

Example/non-example pairs help learners understand new concepts by presenting them with various examples and allowing them to recognize differences between the examples (Merrill, 2004). Examples can emphasize a proper way to conduct a procedure and can help learners identify mistakes or problems within an example.

In accordance with these conditions, each unit in the customer service training program contains a set of learning objectives, examples, scenarios, and activities. The scenarios and examples put learning objectives in action and teach the content. The activities are designed to reinforce the learning objectives and skills being presented. Each activity also acts as an assessment by allowing the learner to assess their own mastery of that particular objective through the feedback supplied.

Scenarios and role plays are included throughout the instructor-led and web-based training units in order to promote personal application of the material

presented. Learners are able to observe multiple scenarios as they complete the web-based units and participate in live role-plays as they complete the instructor-led activities following each web-based unit.

Activities in the instructor-led unit allow participants to develop and refine skills and techniques through interactive means, such as role plays. By presenting thought-provoking questions, activities in the web-based units provide learners with opportunities to review the material they have covered and to reflect on how that material applies to real-world situations.

Example/non-example pairs are used throughout the web-based instruction in an effort to prepare learners to recognize and understand key concepts and skills that they will need to apply to their daily tasks.

#### *Instructional Materials and Content Review*

Osguthorpe (1985) stated that one purpose a designer has for an instructional materials search should be to “build in existing instructional approaches by gaining a broad understanding of presently available teaching materials” (p. 20). To facilitate this process, the BYU design team reviewed a variety of customer service materials, including published works, manuals and handouts from other companies, information and training programs on the internet, and customer service training videos. They also attended a customer service training seminar to gather additional information. Each type of resource



provided information on content, instructional strategies, or designs that could be used as part of the customer service training program.

*Published works.* The BYU team sampled a wide base of published books on customer service to help determine what information to include in the customer service training program. Books such as *Best Practices in Customer Service*, *Delivering Knock Your Socks Off Service*, *Everyone is a Customer*, *Exceptional Customer Service*, and *Lip Service vs. Customer Service* were particularly useful in helping to determine and refine content decisions. As the team skimmed through these books, they noted that key content was included in multiple sources. For example, a majority of the previously-mentioned books address basic skills, such as general listening, communication and problem solving, telephone techniques, the importance of understanding who the customer is, and what problems and emotions the customer may be experiencing (Zemke & Woods, 1999; Anderson & Zemke, 1998; Kearney & Bandle, 1990; National Press Publications, 2000; Jeppesen, 1996).

After gathering these basic content subjects and determining what content should be included, a closer look at the literature helped the team to create a more detailed content outline. The detailed outline included information about the subjects and content described above, as well more in-depth information relating to different forms of communication (Kearney & Bandle, 1990; National

Press Publications, 2000), types of customers (National Press Publications, 2000), what is important to a customer (Kearney & Bandley, 1990), and customer service best practices (Zemke & Woods, 1999; Anderson & Zemke, 1998). The finalized content outline incorporating the material identified in the published works review is described in detail later in this document

*Training manuals.* The BYU design team reviewed training manuals from several different organizations, including Medco, Charles Schwab, and Arizona Public Service. Many of the instructional and design strategies from these manuals were incorporated into the final DMBA customer service training program. These strategies included using a consistent structure and flow for all units, focusing on skill-centered learning (where learners are taught skills and procedures directly applicable to their jobs), and incorporating opportunities for learners to apply these skills. Strategies also focused on providing ample opportunities for personal reflection and review of the materials and skills presented.

*Internet.* A number of computer-based and instructor-led courses were found on the internet. Most of these sites required customers to purchase the training program before viewing the contents of the courses. Since purchasing would have been very costly, the BYU design team was unable to explore these resources in great detail. However, a few of the courses provided some sample

modules. The BYU design team was able to review the instructional strategies and designs used in these samples. Most of the sample courses combined self-paced computer modules with high-impact, instructor-led training. They emphasized the ability of the computer modules to stand alone when necessary and to be available to all employees on a continuous, as-needed basis.

*DMBA materials.* DMBA provided the BYU design team with current customer service training materials from individual departments and with customer service training videos that they had used in the past. The information gathered from the individual departments' materials was minimal, but it helped the BYU design team see what training customer service employees were currently receiving. The videos provided the BYU design team an opportunity to consider different examples of the voice and image used in customer service training.

*Seminar.* The BYU design team attended an instructor-led seminar offered on the BYU campus for staff and employees. Here, the BYU design team was able to gather additional customer service content and to experience the actual presentation and format of an instructor-led training session. This particular experience helped the BYU design team outline the initial instructor-led unit of the DMBA customer service training program.

After analyzing all the customer service training materials, the BYU design team identified and compared instructional patterns, content, themes, strategies, and the voice that other developers had used. This information guided their decisions about what instructional strategies and design principles to include in the training program. However, the information provided no definitive answers as to exactly what topics should be addressed, although several themes did emerge. Using these themes, the BYU design team created a list of potential customer service topics that could be addressed as part of the training program.

Reviewing instructional theories, materials, and customer service subject matter enabled the BYU design team to create a better customer service training program. The delivery medium, design, and instructional strategies used in the program stemmed from research of instructional theories and materials.

Reviewing instructional materials and customer service subject matter yielded themes that were incorporated in the content and additional strategies pertaining to displaying the content of the training program.

## Product Overview

The customer service training program created by the BYU design team is a blended learning solution that meets the needs of DMBA trainers. It includes scripts for one instructor-led unit, eight web-based units with suggested accompanying instructor-led activities, and an orientation to the web-based units. The BYU team designed global templates to standardize the development process of the entire program. These templates were also given to DMBA trainers as a deliverable. They will allow DMBA trainers to create other training materials as needed, according to instructionally sound principles.

Since DMBA trainers wanted to tailor the customer service training program to their unique needs, they agreed to supply specific content, examples, images, and audio conversations as necessary to personalize the customer service training program. Therefore, a master list of all items to be supplied by DMBA was also included in the final deliverable. Each product component (units, orientation, global templates, and master list) is further discussed in this section.

### *Instructor-led Unit*

The instructor-led or “welcome” unit introduces employees, especially customer service representatives, to the entire customer service training program (the content for this unit is located in Appendix B). The welcome unit explains DMBA’s philosophy of customer service and the company’s goals and values in

a personal, face-to-face setting while motivating employees to learn additional customer service skills. This introduction illustrates DMBA's larger vision of how customer service operates within the company.

The welcome unit is designed to last approximately two hours and will be conducted three or four times a year for all new hires and existing employees that are asked to participate. Members of the DMBA training team will facilitate the welcome unit training. The welcome unit includes an introductory video, group discussions, scenarios, role plays, and other activities to reinforce the material. The design of the unit is purposefully flexible so DMBA trainers can add unique content depending on their trainees' needs.

#### *Orientation*

The orientation to the web-based units familiarizes DMBA employees with the functionality and content of the web-based training units. It explains how to navigate through the web-based units and how to use particular features of each unit. For example, the orientation describes how to play audio files and move to the next screen. It takes customer service representatives approximately five minutes to complete.

#### *Web-based Units*

The web-based units present the customer service skills deemed universally necessary by DMBA trainers. Content in the web-based units is

generally presented with scenarios and example/non-example pairs. Activities included in these units clarify and reinforce the material presented by allowing the learners to interact with the content and providing immediate feedback where appropriate. At the end of each unit, a summary, usually in the form of a bulleted list, reviews important concepts covered in the unit. Suggested instructor-led activities are also included to reinforce the concepts presented in each web-based unit. The content of each web-based unit is described below

- Unit 1: Customers: Focuses on understanding DMBA customers and their needs
- Unit 2: Attitude, Confidence, Empathy (ACE): Focuses on developing a positive attitude, confidence and empathy
- Unit 3: Building Relationships: Focuses on building appropriate personal relationships with customers
- Unit 4: Problem Solving: Focuses on solving problems to help meet customers' needs
- Unit 5: Effective Listening: Focuses on expanding listening skills and improving customer interactions
- Unit 6: Communicating Well: Focuses on improving communication skills and avoiding communication problems

- Unit 7: Telephone Tactics: Focuses on learning how to improve telephone skills
- Unit 8: Written Correspondence: Focuses on improving written communication skills and serving customers better

Each of these units takes approximately twenty minutes to complete.

Employees are not required to complete the units in the order designated above.

Each web-based unit is designed to be modular or self-contained so that DMBA trainers and individual employees will have the ability to take individual units throughout the year depending on a specific need or training focus. These units followed a template-based design for standardization purposes.

### *Templates*

Templates were used to standardize this training program and will be used to standardize future training programs. The templates are flexible so that DMBA trainers can use them to create new training programs, with any kind of content. These global templates include web-based templates and instructor-led templates.

*Web-based templates.* The BYU design team sketched screen frame templates for the web-based portion of the customer service training program (a PowerPoint rendition of these screen frames can be found in Appendix C). These templates show the suggested layout of the content in an overall presentation



frame. They consist of elements to present information, examples, activities, and directions. The screen frame templates also contain placeholders for logos, menus, and navigation buttons.

Since the web-based units were delivered to DMBA programmers in script format, the BYU design team developed a script template in order to maintain consistency while scripting (a sample script template can be found in Appendix C). When populated, the script template acts as a screen-by-screen outline of each unit and includes placeholders for all of the necessary information to take the units from script format to the final web-based product. Each scripted page contains descriptions of the type of screen frame template to be used, the functionality pertaining to the screen, a brief description of what the audience will experience, the images, audio, links and directions for the screen, the content on the screen, and a description of any DMBA-specific information that is not present—such as graphics, photos, audio files, and content. Developing and using the script template resulted in a script format that has a uniform language and layout. The DMBA trainers can use this template in the future to create content for additional web-based customer service training units or other training courses.

Another script template was created for a glossary of terms specific to DMBA (this template can be found in Appendix C). This template contains all

the features of the script template, but also includes a table for terms and definitions. This template was not populated by the BYU design team. It will be populated by DMBA trainers and used as a web-based glossary for reference in the customer service training program and other applications.

*Instructor-led templates.* Instructor-led templates were created to act as a standard for this and future instructor-led training meetings at DMBA (sample templates are located in Appendix C). These templates include space for a suggested training meeting outline, which allows trainers to cover any department-specific content. They also includes a reflection section, which allows participants to reflect on what they have already learned, and an activity section, where DMBA trainers can outline any activities to be used as part of the training.

#### *Master List*

Because of the requirement to have a personalized customer service training program, audio, examples, pictures and other program components are still needed in order for DMBA trainers to complete this program. While all of the needed information is noted on the scripts, an extensive master list of items lacking was created in an Excel spreadsheet (this spreadsheet is located in Appendix D). This master list is sorted into individual lists for each type of item needed, specifically photo, audio, graphic, and content needs lists. These lists are

sorted by separate units. They will help DMBA trainers begin to gather the necessary information and complete the training program.



## Process Description

This section discusses the processes used in the creation of the customer service training program. The ADDIE model (Analyze, Design, Develop, Implement, Evaluate) was the underlying method used in the formation of this project. This model was selected due to its wide use by training professionals, positive reputation throughout the field of instructional design, and because it could be easily taught to others (Molenda, 2003). This last characteristic was especially important since a secondary purpose of this project was to educate the DMBA training team on how to implement good instructional design principles and strategies into product development. This purpose was realized through using and teaching the ADDIE model throughout the creation of this project. Each step of the model is discussed below.

### *Analysis*

The BYU design team had to determine what and how DMBA customer service representatives needed to learn through the customer service training program. In order to discover this information, focus groups were conducted with DMBA trainers and front-line employees, resulting in a content outline of relevant topics to be covered in the program. The results of those focus groups are outlined below.

*DMBA trainers.* DMBA's training team provided information about the format and type of program that would best fit the needs of DMBA customer service representatives. The trainers felt a need to minimize the time that customer service representatives spent away from their desks and wanted to have the information easily available to review. They also felt the representatives needed to have an opportunity to practice customer service skills with other employees. Additional meetings with DMBA's training team provided valuable information pertaining to the topics to be included in the customer service program, such as the need to standardize the process of a DMBA phone call and transfer.

*DMBA front-line employees.* The BYU design team conducted a focus group with approximately ten front-line customer service representatives in order to discover how employees interacted with customers and what information they deemed useful in a customer service training program. Data obtained related to the format and topics of the program's content.

After discovering the limited time customer service representatives had to complete the training, the BYU team decided to create brief checklists and summaries throughout the web-based units. Analyzing the data acquired from the front-line employees also guided decisions to include topics about the types

of customers that representatives deal with, phone and face-to-face interactions with customers, and what complaints representatives hear most often.

*Content outline.* Reviews of customer service videos, internet sources, seminars, and printed materials, in addition to the information obtained from DMBA trainers and employees, led to the creation of a content outline of customer service skills to be included in the program. This outline is shown in Table 1.

### *Design*

Using the information gathered through the needs analysis and literature review, the BYU design team began to design the customer service training course.

The BYU design team began the design phase by devising templates for all components of the training program. This was done in order to meet the DMBA training team requirement that this project serve as a model for their future training endeavors. Global templates were designed to accommodate the use of a variety of instructional strategies, such as scenarios, example/non-example pairs, and activities, and may be used when creating new training programs, regardless of content. Designing global templates ensured consistent and standardized development of materials on behalf of the BYU design team and will promote the same standardization among DMBA trainers as they

Table 1

*Content outline for the customer service training program.*

| Unit | Content  | Delivery Method |
|------|--|-----------------|
| 1    | Welcome and purpose<br>Presentation of theme<br>Company philosophy of customer service<br>Evaluation of customer service standards | Instructor-led  |
| 2    | Definition of a customer<br>Customer behaviors   | Web-based       |
| 3    | Empowerment<br>Attitude<br>Confidence  | Web-based       |
| 4    | Focus on building relationships<br>Empathy& genuine concern  | Web-based       |
| 5    | Identify needs<br>Problem solving  | Web-based       |
| 6    | Listening skills   | Web-based       |
| 7    | Communication skills   | Web-based       |
| 8    | Global company language/approach   | Web-based       |
| 9    | Phone communication etiquette  | Web-based       |
| 10   | Written communication etiquette  | Web-based       |
| 11   | Handling difficult customers   | Web-based       |
| 12   | Evaluating customer service<br>DMBA customer service standards<br>Review theme   | Web-based       |



develop training materials in the future. Screen frame and script templates were created as part of this standardization process.

Frame options for the graphical user interface were also sketched. The sketches included areas for the unit title, DMBA's logo, a menu, navigation buttons, general instructions, and space for content. After refining the paper-based sketches, the BYU design team produced final sketches of the frame elements and graphical user interface in PowerPoint and sent them to DMBA's programmers for development.

*Script templates.* Following the design of the screen frame templates, script templates were created for the web-based units in order to maintain consistency and to standardize the language used in the units. (These templates are described in greater detail in the Product Overview.) Due to the various types of information that would be included in the scripts, the BYU design team decided to represent the information with different colors and fonts to make the script templates more user-friendly.

### *Development*

The development of the customer service training program took place in two phases. First, as described earlier, DMBA programmers developed the screen frame templates so that they could have control over and understand the

functionality of the training program. The BYU design team provided sketches and input as part of the template development process.

Through this process, the BYU design team realized that DMBA's programmers had limited time and programming skills. Therefore, the BYU design team decided to simplify the activities in the web-based units so that they would offer generic feedback instead of specific feedback, thereby removing the burden of intensive programming from DMBA programmers. Simplifying the activities also shifted their focus from synthesis and application of the content to memorization and understanding. More advanced activities with specific feedback and application opportunities were suggested for future development and incorporated in the instructor-led activities.

Second, the BYU design team developed the content for the customer service training program by populating the script templates. They began by developing the content for the listening skills unit as a group. This was necessary to ensure that the development of future scripts by individual team members be as consistent as possible. After the BYU design team and the DMBA training team approved the general content for the listening skills script, the remaining units were divided among the BYU design team for content development.

DMBA trainers were concerned with the time that employees would spend on this training and wanted to be sure that each unit was useful to the customer service representatives. Also, during script development, it became apparent that some content applied to multiple units. As a result of these two issues, the content outline was adjusted into the breakdown shown in Table 2. This new categorization covered all of the necessary information in the most efficient manner.

Throughout the development of the scripts for individual units, team members met individually with their faculty advisor and as a group to review and approve the proposed content and functionality. Content specific to DMBA, such as conversations between a DMBA employee and a customer, was not scripted. Instead, it was listed in the section of the script templates that identified items still needed.

One major revision during the development phase of the project was the elimination of a unit pertaining to DMBA's global company language. Content for this unit had to come entirely from DMBA trainers; therefore, it could not be scripted by the BYU design team. Additionally, the BYU design team felt this unit would be best transformed into a glossary that employees could use during the customer service training program and while they performed other work-related tasks. Since DMBA trainers were in the process of creating a company

Table 2

*Revised content outline for the customer service training program.*

| Unit    | Content  | Delivery Method |
|---------|--|-----------------|
| Welcome | Welcome and purpose<br>Company philosophy of customer service                  | Instructor-led  |
| 1       | Definition of a customer<br>Customer behaviors<br>Different types of customers | Web-based       |
| 2       | Attitude<br>Confidence<br>Empathy  | Web-based       |
| 3       | Building relationships   | Web-based       |
| 4       | Identify needs<br>Problem solving  | Web-based       |
| 5       | Listening skills   | Web-based       |
| 6       | Communication skills   | Web-based       |
| 7       | Phone communication etiquette  | Web-based       |
| 8       | Written communication etiquette  | Web-based       |

glossary, a decision was made to use the glossary instead of developing new content for a separate web-based training unit. Thus, the unit relating to global language was eliminated from the revised content outline and a template for a web-based glossary to be populated by DMBA's training team replaced it.

### *Implementation*

Implementation of the entire customer service training program will occur in April, 2004 after DMBA's training team finishes developing the web-based units in Dreamweaver (the web development tool selected for this project). In order to ensure the success of this future implementation, a prototype of the web-based Telephone Tactics unit was completed, implemented and evaluated via the formative evaluation described below (screen shots of this prototype can be found in Appendix E). Most of the functional aspects of the unit were programmed for this prototype. The scripted content of the Telephone Tactics unit was used to populate the templates created by DMBA programmers. However, due to time constraints, scripted audio conversations were played on a tape recorder instead of being incorporated into the prototype. After this unit was completed to a functional state, two usability tests were conducted on this prototype as a formative evaluation.

### *Evaluation*

As stated earlier, DMBA's management identified several key purposes for the customer service training, including standardization of policies, improvement of skills, and increased customer satisfaction. The scope and scale of this project did not allow for a comprehensive evaluation of each of these purposes to be conducted. Instead, it was decided that a small formative

evaluation would be conducted as a part of this project and that an evaluation plan for the entire project be given to DMBA and included in this report (see evaluation plan in Appendix A). The formative evaluation was conducted in two distinct phases: a one-on-one usability test and a group usability test. This formative evaluation was designed to discover the weaknesses and limitations in the overall presentation and organization of the blended learning instructional design solution and to assess the effectiveness of the content in the web-based Telephone Tactics training unit.

*Participants.* DMBA's customer service representatives were identified as the primary evaluation participants for this formative evaluation because they were the intended audience and would be able to provide valid feedback and suggestions. However, no customer service representatives were able to participate in this evaluation because they could not be excused from their work on the days that the evaluation took place. As a result, eight DMBA trainers were randomly chosen to participate in the formative evaluation instead.

*Criteria and standards.* In order to measure the success of the customer service training program, specific criteria were developed. These criteria were used during both evaluation phases. They focused on ensuring that

- Material was presented in an orderly and logical manner
- Navigation was consistent and easy to use (no additional assistance or instruction was required)
- Directions were clear, concise, and guided the participants effectively through the unit
- Material was relevant to each employee's job
- Material provided appropriate opportunities to apply knowledge gained
- Participants' awareness of the skills needed to effectively serve customers over the telephone increased after completing the module

These criteria were modified into the following questions for the first phase of the formative evaluation.

- Was the program difficult to use? Why or why not?
- What did you like about the organization of the material?
- What did you dislike about the organization of the material?
- How could the navigation be improved?
- How could the directions be improved?
- What could be done to make the unit easier to use?

The questionnaire used in the second phase of the evaluation was also created from the aforementioned criteria and standards. It consisted of the following questions.

- Was the unit easy to use? Why or why not?
- What did you like or dislike about the organization of the material?
- How could the navigation and directions be improved?
- How is this material relevant to your job? (i.e., How will this material assist you in improving your job performance? How will this material help you serve your customers better?)
- Were there adequate opportunities to apply or practice the knowledge you gained? Please explain.
- What skills and techniques are you more aware of after completing the unit?
- What material wasn't addressed that should have been?
- What else could be done to make the unit more effective?

*Process.* The first phase of the formative evaluation focused on gathering qualitative data regarding the navigation and usability of the web-based Telephone Tactics prototype. Three DMBA trainers were selected to participate in a one-on-one walkthrough of the prototype with a member of the BYU design team. These trainers were asked to verbally express their thoughts regarding navigational and organizational components as they progressed through the prototype. Members of the BYU design team recorded the information collected from the trainers and asked follow-up questions for clarification. After they



completed the prototype, the trainers were asked to answer the questions created for this phase of the formative evaluation.

The second phase of the formative evaluation involved collecting usability and content-related information from a group of five trainers who were asked to complete the web-based Telephone Tactics prototype individually. After the trainers completed the unit, they answered the written questionnaire created for this second phase. Then, the BYU design team conducted a group question-answer session with them asking what they liked or disliked about the unit and how the unit could be improved.

*Results.* Data obtained in both phases of the formative evaluation centered on the content, feedback, functionality, and appearance of the web-based prototype. During the first phase, data acquired relating to content guided the modification of Telephone Tactics unit into a more robust and user-friendly training module. Information gathered from the second phase about the content will help DMBA trainers refine the unit before it is implemented in April. The suggestions and subsequent changes made because of the formative evaluation will be discussed throughout the rest of this section.

In general, the trainers found the content of the prototype appealing. They felt that it presented the necessary guidelines customer service representatives must know when using the telephone. Yet, they felt that content

on some screens of the prototype was lengthy and could be summarized or put on multiple screens.

Trainers also commented on the feedback presented with the activities. The feedback provided was completely generic by design. One trainer liked receiving general comments because she felt it reminded her of the overall concept being assessed. However, most of the other trainers desired feedback that directly related to their responses.

Trainers had additional comments pertaining to the functionality and look-and-feel of the prototype. They felt that some fonts used in the prototype were too small and did not catch their attention. As a result, they recommended using a bolder font for summary and other important information. Also, trainers paid no attention to the directions included on each screen because they felt at ease using the prototype due to prior internet experiences. Trainers liked the navigational features, but desired to be able to go to any screen at any time with a more detailed menu.

The BYU design team looked carefully at the suggestions made throughout both phases of the evaluation. The suggestions given during phase one about font, directions and navigation of the training caused the team to adjust those features of the training program. They also reordered the activities after phase one. After phase two, a detailed list of the trainer's suggestions and a

synthesized list of suggested changes were sent to DMBA. These recommendations will help to improve the usability and user satisfaction of the final training program.



## Resources, Budget, and Schedule

The original agreement with DMBA called for four masters students to design and develop the entire customer service training program and other students to provide programming and graphic design expertise during BYU's Fall Semester 2003 (September 2 to December 19, 2003) at a cost of \$13,500. For reasons explained below, this agreement was altered throughout the development of the project.

### *Resources*

Due to the time and travel conflicts of potential team members, the number of students devoted to the project was reduced from four to three. Also, after the decision to keep all programming and graphic design related issues in-house, the need for the BYU design team to handle or facilitate programming consultation, software, and graphic design was eliminated.

### *Budget*

Reducing the resources affected the budget, as demonstrated in Table 3. Note that after the original budget was approved, DMBA management decided to reimburse travel expenses incurred by the BYU design team.

### *Schedule*

The BYU design team spent most of the month of September, 2003 analyzing DMBA's needs. The decision to go forth with the customer service

Table 3

*Budget for the customer service training program.*

| Expense                      | Amount Budgeted    | Amount Spent      |
|------------------------------|--------------------|-------------------|
| Student compensation         | \$10,000.00        | \$7,500.00        |
| Programming consultations    | \$2,000.00         | \$0.00            |
| Graphic design               | \$1,000.00         | \$0.00            |
| Software for BYU design team | \$500.00           | \$0.00            |
| Travel expenses              | \$0.00             | \$230.00          |
| <b>Total</b>                 | <b>\$13,500.00</b> | <b>\$7,730.00</b> |

training program as described in this report was made September 25, 2003. Table 4 reflects the schedule for the project from that point forward. Due to difficulty getting prompt feedback from DMBA trainers and a number of meeting delays, many of the delivery dates were pushed back. The unit scripts and final deliverables were delivered later than planned, but within DMBA's initial delivery schedule. The evaluation, which was not required by DMBA, was conducted after the December 19, 2003 delivery date.

Table 4

*Schedule for the customer service training program.*

| Proposed Delivery Date | Actual Delivery Date | Deliverable                  |
|------------------------|----------------------|------------------------------|
| September 18, 2003     | September 25, 2003   | Needs analysis               |
| October 13, 2003       | October 13, 2003     | Design strategy document     |
| October 20, 2003       | November 7, 2003     | Content outline              |
| November 6, 2003       | November 20, 2003    | Draft of unit scripts        |
| November 13, 2003      | December 19, 2003    | Unit scripts                 |
| November 20, 2003      | January 9, 2004      | Evaluation rubric/materials  |
| December 4, 2003       | December 4, 2003     | Script review with DMBA team |
| December 19, 2003      | January 23, 2004     | Formative evaluation         |





## Critique

Both the DMBA training team and the BYU design team are pleased with the overall project. Both parties feel that the DMBA customer service training program meets the purposes and objectives that were outlined at the onset of the project. However, a closer examination of the customer service training program and the process undertaken to create the program reveals both strengths and weaknesses. The strengths of the customer service training program will be discussed first, followed by its weaknesses and the BYU design team's recommendations for improvement. Strengths and weaknesses of the process are described in the Personal Reflections section.

### *Strengths*

There are four main strengths of the customer service training program. These strengths include the fact that the program is robust, modular, extendable, and adaptable.

*Robust.* The customer service training program incorporates solid, well-formed instructional design principles and strategies as well as comprehensive content. The strategies and content stem from the BYU design team's literature review and the information gained from the DMBA focus groups. Reviews of the literature and existing customer service training materials provided the BYU design team with an in-depth look at the methods, instructional strategies and

content used in customer service training manuals in the market today. Focus groups conducted with DMBA trainers and front line employees (those who would be presenting and participating in the customer service training, respectively) allowed the BYU design team to determine the specific needs of DMBA employees. The information gained from these experiences permitted the BYU design team to create new, personalized, and comprehensive training materials that address the specific customer service needs of DMBA employees.

*Modular.* The majority of the customer service training program consists of standardized, self-contained web-based units. This design allows for maximum flexibility in implementation. Because each unit is a self-contained training topic, independent of other units, individual units do not build on one another and can be completed by customer service representatives in any order. Additionally, the training can be taken all at once or the units can be spread out over time depending on the needs of DMBA employees. Also, because the units are modular, changes made to one unit will not affect any of the other units.

*Extendable.* As DMBA's customer service training needs change, the units themselves can be easily modified. Using standardized templates allows DMBA trainers to easily update or modify the content within a unit as needed. In addition, changes can easily be made to the overall structure of the entire program through simple adjustments in the templates. The use of templates and

the modular nature of the program also simplify the process of adding new units to the training program as the need arises. Once the content has been developed, DMBA trainers can easily insert a completely new unit while maintaining the same look and feel of the training program.

*Adaptable.* Not only can DMBA trainers modify and extend their customer service training program, they can adapt the templates and instructional approaches to develop new training courses in any area of the organization. The templates and strategies are not content specific, but are based on sound instructional principles that can be integrated in a variety of situations. They provide a way for DMBA to implement a standardized training program that will grow and develop over time. The templates are simple to use and allow DMBA trainers to update and modify the program to meet their future training needs.

#### *Weaknesses*

A rushed time frame and limited manpower left the customer service program with several weaknesses, including limited application opportunities, generic participant feedback, and a limited evaluation scope.

*Limited application opportunities.* The web-based training offers few in-depth opportunities for participants to directly apply the knowledge and skills they have learned. Most of the learning activities focus more on memorization

and understanding than on synthesis, analysis or application of the content covered. Limited resources (i.e., time and skill level of DMBA programmers) forced the BYU design team to purposefully simplify these activities.

*Generic participant feedback.* The feedback given during the web-based units to participants on activities and assessments is limited. Inadequate manpower was available to program in-depth web-based activities. As a result, the activities and assessments are typically generic. Also, feedback is not specific to participants' answers. Additionally, assessment information is not scored, making it impossible for DMBA trainers to track how participants performed on any of the web-based assessments.

*Limited evaluation scope.* The formative evaluation of the customer service training program is a weakness for several reasons. First, only a prototype of a single web-based unit was evaluated, instead of the entire customer service training program. While it is important to understand the effectiveness of a single unit, it is also important to understand the effectiveness of the program as a whole. A single unit may serve as an effective evaluand when evaluating the overall navigation of a web-based component, but is not as effective as evaluating the content and effectiveness of the entire program.

Second, the formative evaluation focused only on the web-based portion of the program. The instructor-led unit and the integration of the instructor-led

activities with the web-based units were never evaluated. In order to truly understand the impact and effectiveness of the program, both components of a blended learning solution, as well as their effect on one another should be included in the evaluation process.

Third, the formative evaluation participants were DMBA trainers, not front-line customer service representatives. While the trainers provided valuable insights about the content and functionality of the web-based unit they tested, the perspectives of the primary target audience remain unknown. Comments from customer service representatives would have likely provided even better guidance for improving the web-based units. Because the formative evaluation lacked target user feedback, there may be additional weaknesses in the program that have not yet been discovered.

### *Improvements*

To overcome the above weaknesses, the BYU design team suggests the following improvements to the customer service training program. DMBA trainers and executives should devote resources to the programming and development of the customer service training program so that activities and assessments can be improved. Web-based activities should be improved to promote employee analysis and synthesis of the material. Instructor-led activities were created to support and strengthen these weaknesses in the web

based training, and these activities should be further developed and improved to more richly reflect the experience of DMBA employees. Assessments should be developed that will test deeper levels of participants' understanding and provide more individualized feedback to users. Additionally, video should be included in the web-based training units, allowing users to see and be assessed on more detailed examples of customer service behaviors and skills that are difficult to describe in text. Video will also provide a true-to-life feel to enhance the training program.

The BYU design team feels that the entire program should undergo a more rigorous evaluation. This evaluation will help DMBA trainers locate weaknesses in content, organization and presentation of the material in the program. A more thorough evaluation will permit trainers to assess the impact the training program has on employees' job performance and on customers' perception of the services they receive. Appendix A comprises a specific plan for this evaluation.

Even with the weaknesses described previously, the BYU design team feels that the project is a success because it meets DMBA's needs and purposes for customer service training at this time. The customer service training program is a solid first step in the development of a new standardized training curriculum.

## Personal Reflections

Each member of the BYU design team brought unique strengths that contributed to designing and developing the customer service training program. Stephen Evans worked previously in training and user interface development. Meghan Kennedy came to the team with a background in evaluation and assessment. Donna Ure had experience in the development and delivery of stand-up training and had programming expertise. In addition to these unique backgrounds and skill sets, each of the students had completed one year of graduate school in the Instructional Psychology and Technology program which added to their individual skills. In this section, each team member describes his or her personal contributions and lessons learned throughout the process of designing and developing the training program. To open this section of the paper, an overview of each member's primary contributions is displayed in Table 5. The BYU Design Team's personal reflections follow the table.

Table 5

*Contributions of individual members of the BYU design team to the customer service training program.*

| Stephen's Contributions        | Meghan's Contributions                | Donna's Contributions          |
|--------------------------------|---------------------------------------|--------------------------------|
| Unit 3: Building Relationships | Welcome Unit                          | Unit 6: Communicating Well     |
| Unit 4: Problem Solving        | Unit 1: Customers                     | Unit 7: Telephone Tactics      |
| Unit 5: Effective Listening    | Unit 2: Attitude, Confidence, Empathy | Unit 8: Written Correspondence |
| Glossary                       | Instructor-led templates              | Evaluation plan                |
| Presentation Protocol          | Technical Protocol                    | Applied Protocol               |
| Script templates               | Web-tutorial                          | Master list                    |
| Instructor-led activities      | Instructor-led activities             | Instructor-led activities      |



## Stephen's Personal Reflections

Overall, working on a team to complete this project proved to be an intense and rewarding learning experience for me. I joined this team because I desired to have a real-world instructional design experience; one where I could synthesize and integrate the skills taught throughout my coursework as an Instructional Psychology and Technology master's student. Working on this project helped me hone my instructional design skills and leadership abilities. Also, I experienced teamwork in the manner I hope to experience it in my future work endeavors.

### *Individual Contributions*

Prior to starting this project, I gained valuable experience through my previous employment. As a supervisor and teacher at the Missionary Training Center (MTC), I learned how to analyze learner needs, design and deliver training programs, and evaluate learner performance. As an assistant instructional designer at Technology Assisted Language Learning (TALL), I gained experience designing user guidance systems and graphical user interfaces. As a graduate research assistant, I enhanced my research and technical writing skills.

I applied all the skills learned during these experiences to complete my individual contributions outlined in the previous table. The skills I gained as a

research assistant helped me write the scripts and their respective instructor-led activities. The organization and presentation skills I gained from designing user interfaces for TALL aided my design of the script templates and the screen frame templates for the presentation protocol. Additionally, I scripted the units and instructor-led activities about building relationships, solving problems, and listening because I taught these skills to teachers and missionaries at the MTC.

#### *Team Environment*

Being a member of the BYU design team was a demanding yet worthwhile experience. As I explain the team experience from my perspective, I first discuss the limitations of working in our specific team environment. Then, I address the benefits of working on this team.

*Limitations.* The restricted time frame of this project forced individual team members to work on tasks related to their unique strengths, thereby eliminating some opportunities for personal growth. While I enhanced many skills I already possessed, I would have rather assumed challenging tasks with the intent of overcoming my distinct weaknesses.

Along these lines, generating ideas and making decisions were more time consuming due to the increased quantity of individuals involved in the decision-making process. Had I gone through the process of creating the customer service training program alone, I would have made decisions much more quickly.

*Benefits.* Although making decisions was more time consuming, the decisions we arrived at were more thought out and better because of the multiple opinions and perspectives presented by all team members. We were able to refine our ideas and make better decisions since we worked together throughout the entire process.

Additionally, we received beneficial input from our faculty advisor and DMBA trainers that guided our decisions. Our faculty advisor worked in corporate settings prior to her employment as a professor. She provided useful input throughout the design and development process. Also, since DMBA trainers knew their trainees much better than we did, they gave practical advice about our design decisions.

Perhaps the greatest benefit of our team environment was synergy. I believe that the program we created is much better than it would have been had one individual produced it. Donna, Meghan, and I had already built a positive relationship by working together on other projects with our faculty advisor. Our strong professional relationship enabled us to be unified. Because we were unified, our combined efforts had synergistic effects on the outcome of the project, making it greater than the sum of our individual contributions.

### *Lessons Learned*

One cannot undertake a project of this size without learning something along the way. Going through our development process taught me how to schedule my time on a project. Working with a team helped me to realize some things I need to do in future projects. Scripting the customer service content reinforced my desire to master proper social skills and behaviors. I discuss these lessons in greater detail below.

*Development process.* It was a valuable learning experience to go through the steps of the ADDIE model throughout the course of developing the customer service training program. I learned how necessary it is to go through a thorough analysis as quickly as possible. One of the major drawbacks of this project was the lengthy needs analysis. Because DMBA's training team had been newly organized, it was difficult and time consuming to come to a consensus on the best instructional solution to meet the trainers' and employees' immediate needs. Our team only had approximately three and a half months (one semester) to accomplish every phase of the ADDIE model. Spending nearly one month analyzing needs left little time for designing and developing the program and practically no time for implementation and evaluation. In the future, I plan on getting the analysis done as quickly as possible so that the remaining development phases are not compromised.

*Teamwork.* I desired to work as a team on this project and, were it necessary for me to do it over again, I would still want to be part of a team. As I mentioned above, teamwork always seems to provide a better product in the long run. The old adage “Two [or in our case many] heads are better than one” proved to be true throughout the course of this project. We accomplished much more than one person could have accomplished individually.

Working on this particular team reminded me to respect others’ opinions and desires to excel. Sometimes, I found myself yearning to prove my abilities to others, especially to the DMBA trainers. This course of action usually didn’t produce positive results. I found that my relationships with others were much stronger when I allowed them to promote their abilities as well.

*Customer service skills.* I wish I could say that I discovered some new way to talk to and serve others that would eventually revolutionize customer-serving industries. Unfortunately, that didn’t happen. I did gain an appreciation for the simplicity of customer service. To put it bluntly, customer service is just common sense and good manners. Scripting the units about relationships, problem solving, and listening reinforced my desire to get to know people better and hear what they have to say before I jump to conclusions or try to solve their problems.

### *What I Would Do Differently*

Looking back on this experience, I would have done at least two things differently. First and foremost, I would not have taken as many other school courses during the semester we designed and developed the DMBA training program. This experience was too intense when it was mingled with other coursework. I was constantly pulled in multiple directions by various tasks and found myself performing poorly on all of them. I would have provided better input throughout the development process and higher quality work if I had had fewer responsibilities.

Second, I would have taken on more responsibility for the flow of the project at an earlier time. Because this project was instantiated by our faculty advisor, I found myself taking a backseat to some early leadership opportunities. I was grateful for her expertise in the beginning since I had never been involved in a project like this before. However, I should have risen to the occasion much earlier by communicating more directly with DMBA's training team leader and relying less on our advisor to provide all the answers.

### *Capstone Experience*

Designing and developing this training program proved to be a true capstone experience. I used all of the knowledge and skills I gained from my various studies throughout this project. I found myself rereading notes from

classes and reviewing previous assignments to determine the best ways to complete a needs analysis or design script templates. I re-examined instructional theories and strategies to ascertain what proven methods of presenting instruction met our client's needs. I also tried to discover how other designers accomplished similar tasks and what their results were.

Another factor adding to the capstone experience was the real-world nature of the project. It was not just another assignment for my teammates and me to accomplish in order to learn some valuable skill. The project stemmed from a real-world problem and forced us to decide how to solve it. The problem solving process allowed me to use many various skills I acquired as a student.

I appreciate the opportunity I had to work on this project and value the lessons I learned. I was able to incorporate the knowledge and skills I gained from classes and coursework I completed as a graduate student into our product. Because of this capstone experience, I feel more like an instructional designer. I feel prepared to enter the workforce and meet the challenges that await me.





## Meghan's Personal Reflections

Creating the customer service training program for DMBA was a capstone experience that provided me opportunities to apply my knowledge of instructional design, evaluation, and project management. Throughout the course of this project I was able to learn a great deal from the instructional design process and although there were a number of areas in which our team members could personally and collectively improve, I was pleased with our experience and our final product. This section contains my personal reflections on the experience and process.

### *Individual Contributions*

*My contributions.* My previous experience in delivering career development workshops for the Church of Jesus Christ of Latter-day Saints gave me experience in the delivery of instructor-led training and the development of supplemental training activities. My work at the BYU Center for Instructional Design as an evaluation intern also allowed me to add evaluation experience to the team. This background helped define which activities I took on during the design and development of the DMBA customer service training program, whether in assisting or leading a task.

*My responsibilities.* In the initial stages of the project I focused on the content search and fleshing out in more detail the information from the

instructional materials search. Through this process I was able to create initial outlines of the content units that were decided on with the DMBA training team. As Table 5 indicates, I focused on the development of the content for the instructor-led Welcome unit, the orientation to the web-based units, and the web-based units titled *Customers* and *A.C.E.: Attitude, Confidence, and Empathy*. In addition to these units, I designed the instructor-led training templates and wrote additional instructor led activities for the web-based units that I developed. In order to assist in the web development of our product, I was also in charge of creating the template sketches for the technical skills protocol. Through these tasks I was able to have a broad experience in each step of the design process.

#### *Team Environment*

*What went well.* Our group evolved over the course of the project to work as a cohesive team. Because of this team organization, our product was better in quality and depth. Because of the large size of the customer service training, we would not have had the skills or time to complete the project individually. By working together, we were able to pool our knowledge and abilities to create a polished product.

As a team, we worked hard to create an environment where we felt comfortable sharing our ideas. We looked at all ideas objectively and could

critically discuss their utility. Working on a team allowed us to focus on the strengths that we each had to create the best product possible. Throughout the project I identified limitations in the depth of my knowledge of instructional theory and my programming skills. I received a lot of advice and assistance from the team to improve these skills during the course of the project. Additionally, I was able to share my evaluation experience with other team members to improve their skills and the product.

*What didn't go well.* While working together helped us to create a product far better than any of us could have created on our own, our rushed timeframe forced us to take on tasks that we were best suited for instead of ones in which we most needed to improve. This helped to create the best product, but did not help us work on the areas where we were weak. In addition, working in a group increased the time it took to make our decisions and changes. This type of environment was the most favorable for a team, but also took a lot more time and meetings to make decisions and synthesize ideas.

### *Lessons Learned*

The lessons I learned can best be summed up in the following three areas: the development process, teamwork, and customer service content.

*Development process.* Throughout the project, our team used the ADDIE design model to create a sound product. From this experience, I learned a great

deal about the development process and how the ADDIE model could best be leveraged to help create a sound product.

When we started this project, we did not have a clear view of what we were doing or what it would take to successfully complete it. Time, energy and resources would have been better distributed throughout the project if the product had been determined before we started. Our team spent over six weeks deciding on the project and an additional two weeks conducting focus groups about the decided customer service training program. While all of the information that was gathered during these analyses was important and useful, we should have worked more to balance the time spent on the needs analysis with the time spent on design and development. By focusing energy on completing the analysis and initial designs of the product earlier, we would have had more time to develop, implement and evaluate the product we designed.

*Teamwork* I enjoyed working on a team and felt it was one of the most useful parts of this experience. Although, our team had its share of frustrations due to extra meetings and differing opinions, we created a far better product and participated in an experience that will most be like future work environments. In working on the design of the customer service training program, we functioned as a cohesive team and were able to create a product where every deliverable was improved, changed and refined by the entire team. This experience helped

me to see how a successful team should operate and how it can enhance and improve the quality of the final product.

*Customer service content.* Developing customer service soft skills training had a number of positive and negative aspects to it. When the responsibility of developing the content shifted away from DMBA trainers to our team, we were a little overwhelmed with designing the training and becoming customer service experts to develop the content. However, I was surprised at how easy it was to become a customer service subject matter expert and at the completion of our project, I feel confident in my understanding of the topic and best practices in training. I was pleased to realize that customer service is simply a number of basic interaction skills focused on the needs of a specific population. Because we had to become a subject matter expert for this project, I feel too much time and energy was focused on the content development instead of on our skills as instructional designers.

#### *What I Would Do Differently*

Reflecting on this process, there are a number of things I would change to improve the experience. I would like to have more time in my schedule as well as more time overall to create the product. Most of the personal, process, and product changes that I would make, could have been solved by increasing the amount of time for this project within my own schedule and in regards to the

overall project. Although the rushed time frame may have been realistic in many work environments, in order for this to be an appropriate learning experience, more time to improve weaknesses and walk through the process, would have been helpful.

I also feel that the student team should have had more ownership in the product at an earlier stage. At the beginning, it was much easier to allow the faculty advisor to take charge and lead the discussions or the process. I think I would have learned more and have been forced to leave my comfort zone if we had been the contact for the client and if we were able to lead the meetings with the clients. I also think this format would relieve much of the burden from the faculty advisor, allowing her to function as a support system and not as a team member or leader. I acknowledge that by doing this, we would have had a lot more problems and failures, but I believe that this would have been a better learning experience for our team.

### *Capstone Experience*

This experience was the capstone experience for my studies as an instructional psychology and technology student. I felt this was a vital experience for allowing me to be confident in the process of instructional design and the products I can create upon leaving BYU to take a job in this field.

Overall, through this project I realized how much I enjoy the creative and problem solving processes of instructional design. Through each stage of the ADDIE model I was able to see all of the instructional design, evaluation, project management and assessment knowledge I had gained in the Instruction Psychology and Technology program come into play. Not only did I need to communicate effectively about what we were doing and why we were doing it, but I needed to see as much of the big picture as was possible. I appreciate the ADDIE model for its overall all guidance through the creation of the product, but recognize it simply as a building block for instructional design. The overall instructional design process is iterative and it continually draws upon all the knowledge we have and must continue to gather within the field.

Instructional design is about problem solving and finding creative solutions that meet the needs of the client while building on solid instructional foundations. As we were able to create solutions and do so in a tangible and productive way, I felt that our time was well-spent. Being able to build something useful and relevant to help people learn is a very rewarding experience.

This project brought together all of the skills I have been able to acquire throughout my coursework in the past 18 months. I was able to see how the instructional design process operates under real-world constraints to meet actual

deadlines and needs. This project has helped me to extend my understanding of my coursework and help me to contextualize my knowledge within a framework of real-life applications.



## Donna's Personal Reflections

The goal of this experience was to provide the BYU design team with a real-world problem and allow them the opportunity to operate as a team in developing a solution for the problem. From a student's perspective, it was an interesting and unique process. The overall experience proved to be a positive one, although there are some ways in which it could have been improved. This section contains my personal reflection of the entire experience.

### *Individual Contributions*

*My contributions.* As a former consultant at the Learning and Professional Development Center for PricewaterhouseCoopers, I had some previous experience developing and delivering instructor-led training. I also brought some technology and programming experience to the team. These skills were used to determine which of the many tasks I would be responsible for as a member of the team.

*My responsibilities.* As shown in Table 5, I was responsible for developing the content of the web-based units titled *Communicating Well*, *Telephone Tactics* and *Written Correspondence*. I was chosen to work on these units because these topics complimented my previous work experience and skill set. I was also selected to work on the evaluation plan because I was simultaneously enrolled in an evaluation class. Developing the evaluation as part of the coursework for that

class strengthened the evaluation because it was reviewed by numerous experts, instead of just by our team. Because I had the most technical background, the team felt that I had a better understanding of the programming and other technical requirements involved in template design. As the applied protocol templates were the most detailed, I was selected to be responsible for their development effort. I volunteered to create the Master List, which involved organizing references and other data in Excel. Each team member was responsible for the development of the instructor-led activities that went along with their assigned web-based units, as they were the one most familiar with the content of those units.

#### *Team Environment*

Working as a team provided us with many positive experiences and some challenges as well.

*What went well.* Working on a team, I quickly found out that synergy was very important. Working together, we could take three ideas, refine and develop them into a better idea than any of us could develop on our own. In this instance, the whole team was definitely better than the sum of its parts.

Working on a team allowed us to use our individual strengths to our advantage and manage our time effectively. For example, one member had a very familiar, welcoming writing style which was very conducive to drawing

participants into the program. After each of us attempted to do this very thing, we realized that utilizing that particular team member's skills in that specific area could save us a lot of time and effort. At that point, the team determined that she should focus her efforts on developing that part of the program, while other team members devoted time to tasks that they were better suited for.

Because we did have more than one member working on this project, team members were able to learn from each other. For example, I had never done an evaluation before, and felt that I was particularly weak in this area. The team allowed me to take charge of the evaluation, and they were willing to help and mentor me through the process when I needed it so I could develop that skill.

*What didn't go well.* Working on a team had a couple of drawbacks. Because there were three team members, we all had many different ideas, and different strategies we wanted to implement. Working through everyone's different ideas and contributions often took up a significant amount of time, although the overall result was usually worth it.

Also, because of the rushed time frame, each team member was not able to spend as much time overcoming personal weaknesses or developing expertise in an area as they may have liked. Although each team member participated in all aspects of the instructional design process, the leadership or ownership of certain

portions of the project often fell to the team member with the most experience in a particular area.

### *Lessons Learned*

The lessons I learned from this experience can be classified into three main areas. These are development process, teamwork and customer service content.

*Development process.* This project provided me with the opportunity to follow the same project through each stage of the ADDIE model. Working through this process taught me several things.

I learned having clearly defined goals, and a sense of direction is very important to the success of the product. On this particular project, significant time was spent in the analysis stage, trying to determine what the goals and needs of the organization were. It was very frustrating trying to figure out what kind of program would meet DMBA's needs, when they hadn't clearly identified what exactly their needs were. I felt that the BYU Design Team was brought in before the organization had a clear idea of what direction they wanted to go, and what types of products they were going to need. Due to the lack of organization strategy and direction, too much time was spent in the analysis stage. This forced the design team to move quickly through the remaining stages. As a result, the implementation and evaluation stages were compromised.

*Teamwork.* The majority of the lessons I learned about teamwork were discussed in the team environment section of this reflection. In addition to the lessons mentioned there, I learned the difference between groups and teams. On this project, the members truly functioned as a team. We each took responsibility for certain portions of the design and development process, but the final product reflected a true team effort. It would be impossible for me to point to a certain section of the customer service program and say "That was mine. I did that." I may have had primary ownership, but the team collectively designed and developed the entire program.

*Customer service content.* Initially, I was hesitant to serve as a subject matter expert and develop the actual content for the customer service training program. However, after reviewing existing training materials, I learned that the content is not that complex. For the most part, it involves basic, common-sense skills. The hardest part was not deciding what content to include, but determining how to best organize the content. I learned a few customer service tricks along the way, such as how to do a warm transfer, and what kind of information to leave on your outgoing voicemail message, but for the most part the content was pretty basic. It surprised me to hear members of the DMBA training team remark that we had included information in the training program that they, the subject matter experts, were not aware of.

*What I Would Do Differently*

Overall, I really enjoyed this experience. I felt that there were things I learned here, working in a real-world, team environment that would be impossible to duplicate in any other academic program. However, there are a few things I would change if I had to do it over again.

First, I would make a conscious effort to have this be an immersion experience, where the instructional designers work as a true cohort or team, and are completely involved in the project work. I would take fewer credits, which would allow me to focus more on the project itself. It was often frustrating to hear DMBA trainers request that we focus on something, and then have to tell them we couldn't because we had other classes and assignments we had to take care of.

Second, I would wait until the company had their training strategy and goals in place before walking in as the instructional designers. Doing so would eliminate the time needed to complete the analysis stage of the project, and allow designers to experience more of the development, implementation and evaluation stages of the process.

Third, I would seek more personal responsibility for interfacing and communicating directly with the client. Because our faculty advisor instantiated the relationship with the client, it was easy to fall into a pattern of allowing her to

continue communications with the client, rather than taking personal responsibility for communicating and negotiating with the client directly. In the future, I would force myself to step up and take more of a leadership role early on in the project.

### *Capstone Experience*

This project brought together many of the skills and techniques I have been studying over the last 18 months as an instructional psychology and technology student and presented me with the opportunity to apply them to a real-world problem. Previous coursework typically required that I apply a specific skill to a specific problem (i.e. develop an evaluation plan for an existing program). This project forced me to apply multiple skills to a single problem in order to achieve an effective solution. Evaluation, for example, was not an isolated incident with definite stop and start dates, but an iterative, recurring process that must be dealt with on a continuing basis.

This project also removed some of the scaffolding evident in normal academic courses. The faculty advisor did not have a pre-determined solution in mind, nor did she have an existing knowledge base of literature and instructional materials to which we could refer. She did have previous project experience and expertise, which we as students could use as a resource, but we were expected to

find, use or create our own resources when developing our solution to the problem.

Overall, I enjoyed the challenge of this experience. I felt that the skills I gained through this process will be directly applicable to my career once I leave the university. Working with an outside client gave me the opportunity to see what really happens in organizations, and how they operate. This experience also allowed me to work in a team environment, under real-world constraints, where the project doesn't end just because the semester did.



## Team Summary

As a team, we worked very well together. We recognized that each member brought a unique perspective and skill set to the team, and we sought to respect one another's opinions. All team members realized the value of communicating and sharing ideas with one another, and the significance of working together to solve problems and finish the project. This product was a capstone experience preparing us to be successful in our future employment, as designers and as team members.



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## Appendix A

### Summative Evaluation Plan



## Purpose

This full-scale evaluation plan is designed to assess the effectiveness of the new customer service training program after its implementation in April, 2004.

The evaluation will be conducted in two phases. In Phase 1, each web-based unit of the customer service training program will be formatively evaluated as it is implemented. This purpose of this portion of the evaluation is to discover the weaknesses and limitations in the overall presentation and organization of the web-based units and to assess the effectiveness of the content in each of the web-based units.

After each web-based unit has been formatively evaluated, the training program as a whole (including all instructor-led and web-based components) will be summatively evaluated in Phase 2 to determine if the training accomplished the purposes described later in this proposal.

### *Sponsors and Stakeholders*

The primary sponsor for this project is DMBA. Like many organizations involved in the insurance and benefits industry, DMBA has determined that outstanding customer service is a key component of their business. Having identified it as such, they are willing to invest significant time and resources in training new employees and providing refresher courses to continuing and

mature employees. This evaluation provides a way for them to evaluate their progress and ensure that the training is providing benefits to the organization.

Multiple stakeholders have been identified as important in this evaluation. They include

- DMBA training team
- DMBA employees
- DMBA customers
- DMBA management

Each of these stakeholder groups has unique issues and concerns regarding customer service and the training of customer service representatives.

*DMBA training team.* The training team desires a high quality training program for all functional divisions (billing, retirement, missionary medical, etc.). A single standardized program is important to allow trainers to train employees across divisions and learn the skills needed to develop future training.

*DMBA employees.* Employees are concerned with having a program that covers basic customer service skills. Employees would like to use the program to gather or collect information related to customer service skills, and to apply the skills they learn during the training. They want information specific to their job-areas in addition to information that is standard across business departments.



*DMBA customers.* Customers need professional, knowledgeable customer service representatives that can satisfactorily assist them in a timely manner. They want someone they feel comfortable talking with, someone they feel can solve their problems and make their customer service experience a positive one.

*DMBA management.* DMBA management wants a cross-functional training team to design and develop future training programs. They want employees to have good customer service skills and to feel confident doing their jobs. Most importantly, DMBA management wants customers to be satisfied with the service they receive.

#### *Evaluand*

The customer training program being developed for DMBA is the evaluand for this evaluation. This particular training program is composed of two elements: web-based training and instructor-led training components.

The web-based training component will last approximately two hours. The content has been divided into eight separate sections or units. Employees will be allowed to work through each unit at their own pace. Each unit will use multiple instructional methods for employees to apply and assess their own understanding of the concepts being taught. Units will contain examples, interactive quizzes, and other activities to engage the learner.

Instructor-led activities will be developed to expand and reinforce the content taught in each of the eight web-based units. These activities will be conducted in individual departments by departmental trainers. This will allow the trainer to personalize the activity and address individual department or group concerns relating to that particular entity. This experience will reinforce skills and techniques learned in the web-based experience, and allow employees to role play and experience situations unique to their department.

The instructor-led welcome unit is designed to last approximately two hours and will be used three to four times a year for all new hires and current employees that are asked to participate. Members of the DMBA training team will lead the training of the welcome unit that includes an introductory video, group discussions, scenarios, role plays, and other activities to reinforce the material. The template-based design will allow DMBA trainers to add unique content in the future depending on their departmental situations and training needs.

The entire training experience (web-based and instructor-led) will initially be offered to all existing customer service representatives, and will be mandatory for all new hires. All existing employees will be required to complete the entire training course after it is rolled out. After completing the course, existing

employees will be able to review the course materials on a monthly basis, or whenever it is deemed necessary by their trainer.

### *Criteria and Standards*

At the onset of this proposal, three key purposes were identified. Those purposes also serve as the criteria for this evaluation.

- Improve employees' customer service skills
- Increase customer satisfaction
- Standardize customer service policies and procedures

In order for the training program to be considered effective or successful, it must meet those three criteria. How to measure whether or not the program successfully met these criteria is part of setting standards. The sponsor provided the following standards that they wish to measure the program against as part of both the formative and summative evaluation.

*Formative evaluation.* Criteria for the formative evaluation focus on ensuring that each web-based unit is presented in a logical and comprehensive manner, and that the web-based unit is user-friendly and easy to navigate.

Specific criteria include

- Material is presented in an orderly and logical manner
- Navigation is consistent and easy to use (no additional assistance or instruction is required)

- Directions are clear, concise, and guide the participants effectively
- Material is relevant to each employee's job
- Material provides appropriate opportunities to apply knowledge gained
- Participants' awareness of the skills needed to effectively serve customers over the telephone increases after completing the module

*Summative evaluation.* The summative evaluation is focused on the effect of the overall training program (both web-based and instructor-led components) on customer service representative's job performance. Criteria for this portion of the evaluation include

- Improve the tri-annual customer survey by one point for questions related to service received by operational representatives (the next survey is scheduled for 2005)
- Improve quality of customer service level for each representative (to be measured during monthly performance review) by three points over a six-month period after training has been completed
- Improve phone call efficiency (measured by of talk time and abandonment rate) by 5% over the 12 months following training completion
- Increase the level of standardization in the organization by 10% over the 12 months following completion of training

### *Primary Evaluation Questions*

The purpose of this evaluation is to determine if the customer service training program is able to meet the previously-established objectives to

- Improve employees' customer service skills
- Increase customer satisfaction
- Standardize customer service policies and procedures

Determining if these purposes have been met requires that stakeholders provide information to answer the following questions.

- Did the training impact the performance of customer service representatives?
- Are customers more satisfied with the service they are receiving now (as opposed to service they received before the training was implemented)?
- Are all employees providing the same quality of service, regardless of which division they represent?
- Are all employees consistent in the manner in which they help and assist customers?

### *Data Gathering Activities*

Collecting the appropriate evaluation information will require a variety of methods and will be done separately for the formative and summative portions of the evaluation. The information collected during Phase 1 (the formative

evaluation) will focus on program usability and content effectiveness of each web-based unit. Information will be collected through both a one-on-one usability test and a small group usability test.

Phase 2 is a summative evaluation, which will consist of collecting and analyzing qualitative and quantitative information after the training program has been implemented by the DMBA training team. The information gathered in this phase will focus on the overall effectiveness of the training program.

*Formative evaluation.* During the formative evaluation, a functional prototype of each unit will be developed. That prototype will be piloted on five or six potential users selected from DMBA's customer service representatives, and from DMBA's training management team. DMBA customer service representatives will participate in a one-on-one walkthrough of the prototype with a member of the DMBA training team. These customer service representatives will be asked to verbally express their thoughts regarding navigational and organizational components as they progress through the prototype. Information collected from the customer service representatives will be recorded using written notes and/or audio recordings. After completing each web-based unit, the customer service representatives will be asked to verbally answer the questions created for this phase of the formative evaluation (a sample of the questionnaire can be found at the end of this appendix).

The small group portion of the formative evaluation will involve collecting usability and content-related information from a group of customer service representatives who will be asked to complete the web-based prototype individually. A group question-answer session will also be conducted with the customer service representatives, asking what they like or dislike about the unit and how the unit can be improved. After the customer service representatives complete the unit and group discussion, they will be asked to answer the written questionnaire created for this second phase (a sample of the questionnaire can be found at the end of this appendix).

*Summative evaluation.* The data collection process for Phase 2 is similar to the data collection process in Phase 1. The major difference in this phase is that data gathered will focus on what the training actually did provide. Questions will be focused around the questions previously identified in this report. Data will be gathered through personal interviews, surveys (to customers and customer service representatives), through coding and analysis of actual customer service representative telephone calls (that have been recorded), and through performance evaluation assessments. Technical data (such as talk time and abandonment rate) will be generated by an existing system and used as part of the analysis as well.

## Analysis and Interpretation

The type of data being gathered during this evaluation varies, as does the intended audience and use of that data. Data for the formative evaluation is mainly qualitative in nature, and is intended for immediate use by the DMBA programming team. Data for the summative phase is both quantitative and qualitative in nature, and is intended for use by the stakeholders and sponsors. For these reasons, the analysis of the data will be different for each phase.

### *Formative Data*

Phase 1 will be an ongoing formative analysis of the design and development of the web-based units. This means that data gathered during this phase must be quickly analyzed and implemented into all units of the web-based training. Information gathered from the participants will be synthesized by a selected group of trainers, who will also serve as DMBA evaluation team members. As common themes or trends emerge, these themes will be noted. The evaluation team will review and discuss these themes among themselves and form a recommended plan of action based on these themes, to present to all DMBA trainers at weekly meetings. After approval, these recommendations will be implemented by the DMBA programming team into the ongoing design and development of the customer service training program. For example, if



participants feel that the font size is too small, the evaluation team will recommend that programmers increase the font size.

### *Summative Data*

Phase 2 focuses on a summative evaluation of the effectiveness of the training program. Quantitative data will be gathered by DMBA evaluation team members and will be compared across time (before and after training implementation) to see what improvements have been made. Specifically, data will be gathered on individual performance evaluations as they pertain to customer service, on customer satisfaction as measured by the tri-annual customer survey, and on telephone talk time and abandon rate.

To determine if standardization has been achieved, the individual results of the above data measurements (performance scores, customer satisfaction and telephone statistics) will be aggregated at the department level. The results will be compared across departments to determine if each department is performing at about the same level, and what (if any) significant differences exist between departments.

Once the analysis is complete, the results will be compared with the previously-identified evaluation criteria and standards to determine if the training program accomplished its overall purpose. Stakeholders from DMBA (primarily the head of training and a few training department managers) will

review both the analysis and interpretation of the data before the final report is released to ensure accuracy and completeness of the data.

### Reporting

The results of this evaluation are especially important to the DMBA training team and DMBA management. The results of this evaluation will be made available to each group using a mixture of mediums.

- The entire summative evaluation will be written up as a formal evaluation report. This report will be available online and can be accessed through DMBA's intranet site.
- An executive summary of that report will be distributed to management. This executive summary will be available online as well.
- A short presentation will be made to targeted members of management who have a direct interest in customer service (i.e. CEO, CFO, etc.), informing them of the evaluation outcomes.
- Actual surveys (used as part of the data collection) will be available for management, human resources and trainers to review.
- Trainers and selected members of the Human Resources Department will meet for a more formal and in-depth presentation, to debrief and to discuss next steps in terms of customer service training at DMBA.

## Resources

In most evaluations, there are three resources that must be accounted for.

These resources include money, time and human capital.

### *Money*

The evaluation portion of the project will be carried out internally by DMBA employees. The costs for this portion will be subsumed in the existing salaries of DMBA employees.

### *Time*

DMBA has budgeted four months to implement the customer service training program and to complete the summative evaluation.

### *Human Capital*

DMBA has determined that the following human capital is necessary to successfully complete the evaluation portion of the project.

- Computer Programmer
- Evaluation Team

DMBA has a computer programmer on staff who can devote time and energy to this project. They can also assign members of the training team to work on the evaluation team as part of their regular duties.

## Schedule and Budget

The schedule for this evaluation is somewhat flexible, as the actual evaluand has yet to be implemented. The following is the planned development, implementation and evaluation schedule.

| <b>Date</b>          | <b>Milestone</b>   | <b>Cost</b>   |
|----------------------|--|---|
| January 2004         | Pilot evaluation complete  | Completed by BYU Design Team, no extra cost   |
| January – March 2004 | Formative evaluation complete  | Part of regular employee contracts, no extra cost   |
| March 2004           | Measure the level of customer service given by employees (pre-training measurement)  | Part of regular, monthly employee performance evaluation, no extra cost   |
| April 2004           | Customer Service Training Rollout  | Some cost to productivity, as members are pulled away from the front lines to complete training, but no more than for regularly scheduled training meetings |
| May 2004             | Measure the level of customer service given by employees (post-training measurement) | Part of regular monthly employee performance evaluation, no extra costs   |
| June 7-11, 2004      | Analyze data collected, compare March and May measurements                           | Training manager will assign someone to help with this (part of regular duties)   |
| June 14-18, 2004     | Write formal evaluation report   | Training manager will assign someone to help with this (part of regular duties)   |
| June 21-25, 2004     | Create executive summary and presentations   | Training manager will assign someone to help with this (part of regular duties)   |
| June 28-30, 2004     | Formal presentations and debriefs  | Training manager (part of regular duties)   |

|                  |   |   |
|------------------|---|---|
| August<br>2004   | Measure the level of customer service given by employees (see if they have retained the training) | Part of regular monthly employee performance evaluation, no extra costs |
| January<br>2005  | Tri-annual customer service survey  | Part of regular performance evaluation, no extra costs                  |
| February<br>2005 | Compare tri-annual customer service survey results with results from previous years               | Already budgeted as part of regular training costs                      |

### Formative Evaluation Questions for One-on-One Walkthroughs

- Was the program difficult to use? Why or why not?
- What did you like about the organization of the material?
- What did you dislike about the organization of the material?
- How could the navigation be improved?
- How could the directions be improved?
- What could be done to make the unit easier to use?

### Formative Evaluation Questions for Small Group Evaluation

- Was the unit easy to use? Why or why not?
- What did you like or dislike about the organization of the material?
- How could the navigation and directions be improved?
- How is this material relevant to your job? (i.e., how will this material assist you in improving your job performance? How will this material help you serve your customers better?)
- Were there adequate opportunities to apply or practice the knowledge you gained? Please explain.
- What skills and techniques are you more aware of after completing the unit?
- What material wasn't addressed that should have been?
- What else could be done to make the unit more effective?

## Summative Evaluation Questions

### *DMBA Trainers*

- Are DMBA supervisors/trainers more comfortable with the skills of their customer service representatives after the training?
- Are employees' monthly customer service reviews consistently higher after having completed the training?
- Do trainers feel that the training is meeting their requirements?
- Does the training adequately cover the topics it needs to cover?
- Does the training provide all the skills needed for a new hire to work effectively?
- Has the training impacted talk time, abandon rate, etc?

### *DMBA Employees*

- Are customer service representatives more comfortable with their own customer service skills and performance after having received the training?
- Did the training provide customer service representatives with the ability to understand and assist customers in ways they could not have prior to receiving the training?
- Did the training introduce all the skills needed for a new customer service representative to work effectively?



*DMBA Customers*

- Do customers feel that overall, customer service has improved?
- What areas do customers feel still need improvement (billing, missionary medical, savings, retirement)?
- Are customers more satisfied with the service they received this year as compared to the last time the survey was conducted (pre-training implementation)?



Appendix B

Unit Scripts



**TOPIC: Introduction to Deseret Mutual Customer Service Training**

**OBJECTIVE:** To introduce the Deseret Mutual Customer Service Training to the employees. To help them to understand why Customer Service Training is important and how they can improve as individuals.

| <b>MATERIALS:</b>  | <b>NUMBER OF PARTICIPANTS:</b> | <b>ESTIMATED DURATION:</b> |
|--|--------------------------------|----------------------------|
| DM Welcome Video<br>TV<br>VCR<br>Whoppers<br>Candy<br>Writing board<br>Copies of DM CS philosophy<br>Copies of DM core purpose and values<br>Needed materials for Activity 1 & 2 | 6+                             | 2 hours                    |

| <b>INSTRUCTION</b>  | <b>TIME: 10 MIN</b> | <b>MATERIALS: DESERET MUTUAL WELCOME VIDEO, TV, VCR</b> |
|---|---------------------|---|
| <p>1. Welcome and group introductions.</p> <p>2. Play Deseret Mutual Welcome Video: <i>See Video Description sheet for explanation</i></p>  |                     |   |
| <b>DISCUSSION QUESTIONS</b>   | <b>TIME</b>         | <b>MATERIALS</b>  |
| None  |                     |   |
| <b>ACTIVITY: DISCUSSION</b>   | <b>TIME: 20 MIN</b> | <b>MATERIALS: WHOPPERS, OTHER CANDY, WRITING BOARD</b>  |
| <p>1. Ask participants to think about a really bad customer service experience they have had. Split them into groups of 2-4 and have them share. Have a few people share their stories with everyone.<br/>(Give out Whoppers for the biggest whopper of a story)</p> <p>2. Ask participants to think about a really good customer service experience they have had. Split them into groups of 2-4 and have them share. Have a few people share their stories with everyone.<br/>(Give out candy for the most impressive story)</p> <p>3. Talk about what was different between the two experiences, what did the 2<sup>nd</sup> example do that the first didn't (list on the board) for example:</p> <ul style="list-style-type: none"> <li>• They listened</li> <li>• They cared</li> </ul> |                     |   |

|   |                     |  |
|---|---------------------|--|
| <ul style="list-style-type: none"> <li>• They found out information</li> </ul> <p>4. Talk about WOW customer service and what items they listed in #3 that make up a WOW experience (could be most of them).</p> <p><i>*Note: It is not necessary to include content in the instruction part of the template, if you have a handout that refers to that content.</i></p>  |                     |  |
| <b>INSTRUCTION</b>  | <b>TIME: 5 MIN</b>  | <b>MATERIALS: COPIES OF DM CS PHILOSOPHY</b> |
| <p>1. Pass out copies of the Deseret Mutual Customer Service philosophy.</p> <p>2. Ask someone to read the Deseret Mutual Customer Service philosophy out loud.</p> <p>“Serving customers is one of the most important parts of the work we do at Deseret Mutual. Our core purpose is “To Improve People’s Health and Financial Well Being” and taking care of the participants well is critical to fulfilling our core purpose. One of the main goals is to completely help a customer with everything they need rather than just answer the question of the moment. Giving them all the information they need to help with whatever their situation is provides them with the best service possible.”</p> |                     |  |
| <b>DISCUSSION QUESTIONS</b>   | <b>TIME: 5 MIN</b>  | <b>MATERIALS: NONE</b>                       |
| <p>1. What are the key elements of the Deseret Mutual Customer Service Philosophy?</p> <p>2. Do you see elements of our 2<sup>nd</sup> (good) customer service example in this philosophy?</p>  |                     |  |
| <b>ACTIVITY:<br/>SEE ACTIVITY 1</b>   | <b>TIME: 10 MIN</b> | <b>MATERIALS: SCRIPTED MESSAGES</b>          |
| <p>We suggest a brief activity that focuses on the Deseret Mutual Customer Service Philosophy, specifically on the topic of communication. This activity would stress the need for communication within the company as well as with our customers, in order to help them with everything they need and to improve their overall situation. An example activity is attached as <b><u>Activity 1</u></b>.</p>   |                     |  |
| <b>INSTRUCTION<br/>(COULD PRESENT<br/>INFORMATION IN THE<br/>FORM OF LECTURE,<br/>POWER POINT, OR<br/>HANDOUT)</b>  | <b>TIME: 10 MIN</b> | <b>MATERIALS: NONE</b>                       |
| <p>Being the best benefits administrator on the face of the earth means that it is your job to exceed customers’ expectations at every interaction. Focusing on the following topics will help you to provide exceptional customer service. Encourage the employees to think about any experiences they have had with these topics and how we can improve on these topics at Deseret Mutual.</p> <p>How can we provide exceptional customer service?</p> <p>1. Understand who you are serving: Knowing who your customers are and what they</p>   |                     |  |

**Welcome**

- need helps you be prepared to serve them in the best way possible.
2. Focusing on yourself: Improving your interpersonal skills (Attitude, Confidence, Empathy) will help you feel comfortable in your job as well as improve the service you provide your customers.
  3. Build relationships: Focusing on developing appropriate and personal relationships with our customers will help them to know we care and make them want to continue to do business with us.
  4. Solve problems: Problems are inevitable, but it is up to you to make those problems just another opportunity for you to provide exceptional customer service.
  5. Listen effectively: Whether you are able to solve a customer’s problem or not, good listening is always valuable to serving your customer well. They want to be validated and heard just as much as they want their problems solved and questions answered.
  6. Communicate well with your customers: Developing communication skills is important in every situation and will make the difference between an average and an exceptional interaction.
  7. Excellent phone & written communication: At Deseret Mutual, all of our communication should be timely, helpful, and professional. Focusing on how to improve our phone and written communication will increase the quality level of the service we provide.

In order to be the best benefits administrator on the face of the earth, we must improve on every service we offer, in everyway possible. This is a task we must do as individuals, departments, and as an entire company. The Customer Service Training you will be going through will focus on these topics to help you improve how you serve your customers.

|   |                     |   |
|---|---------------------|---|
| <b>DISCUSSION QUESTIONS</b>   | <b>TIME: 5 MIN</b>  | <b>MATERIALS: NONE</b>  |
| <ol style="list-style-type: none"> <li>1. What experiences have you had with these topics?</li> <li>2. How can we improve how we do these things at Deseret Mutual?</li> </ol>  |                     |   |
| <b>ACTIVITY:<br/>SEE ACTIVITY 2</b>   | <b>TIME: 20 MIN</b> | <b>MATERIALS: 2 KNIVES, BREAD,<br/>PEANUT-BUTTER, JELLY, PLATE,<br/>NAPKINS, 4 BLINDFOLDS</b> |
| <p>We suggest a team activity that builds team unity and focuses on being mindful of others (customers and fellow employees) and how important that is to exceeding customers’ expectations. An example activity is attached as <b><u>Activity 2</u></b>.</p>                           |                     |   |
| <b>INSTRUCTION</b>  | <b>TIME: 5 MIN</b>  | <b>MATERIALS: COPIES OF THE CORE<br/>PURPOSE AND VALUES OF DESERET<br/>MUTUAL</b>             |
| <ol style="list-style-type: none"> <li>1. Pass out copies of the core purpose and values of Deseret Mutual.</li> <li>2. Ask someone to read the core purpose and values of Deseret Mutual out loud.</li> </ol> <p>Core Purpose: To Improve People’s Health and Financial Well Being</p> |                     |   |

## Welcome

|  |                     |                                |
|--|---------------------|--------------------------------|
| Core Values: -Do our work with Integrity.<br>-Make a difference in the lives of the people we serve.<br>-Embrace creative solutions in our work.<br>-Have respect and genuine concern for each other.  |                     |                                |
| <b>DISCUSSION QUESTIONS</b>  | <b>TIME: 5 MIN</b>  | <b>MATERIALS: NONE</b>         |
| 1. How do these values affect your jobs as customer service representatives?   |                     |                                |
| <b>ACTIVITY:<br/>SEE ACTIVITY 3</b>  | <b>TIME: 15 MIN</b> | <b>MATERIALS: ROPE, STRING</b> |
| We suggest a team activity that focuses on coming up with creative solutions and thinking outside of the box. The activity should tie in the ideas of helping a customer with everything they need and finding creative solutions (company philosophy and core values) while focusing on developing respect and genuine concern for each other and making a difference for others (core values). An example activity is attached as <b><u>Activity 3</u></b> .                                     |                     |                                |
| <b>INSTRUCTION</b>   | <b>TIME: 10 MIN</b> | <b>MATERIALS: NONE</b>         |
| <ol style="list-style-type: none"> <li>1. Share again the vision of Deseret Mutual and affirm their vital role in the success of the company. Talk about how important customer service and overall concern for each other is for the success of Deseret Mutual.</li> <li>2. Ask if they have any questions or comments.</li> <li>3. Thank them and stress the importance of focusing on customer service and using the training to focus on building their skills throughout the year.</li> </ol> |                     |                                |



***Deseret Mutual Customer Service Welcome Video***

We recommend having a 5-10 minute video made that introduces your employees to the customer service training program. It can be used as a motivating commercial; an intro to computer training and instructor led training, and can help to focus the company on their customer service approach.

In it we recommend:

- Having Michael Stapely speak
- Telling employees why this is important and how it will affect them
- Discussing WOW employees
- Discussing what DMBA believes empowerment is and what DMBA employees can do for their customers
- Focusing on the feelings and results associated with good customer service
- Sharing powerful and brief testimonials from employees and customers

**ACTIVITY 1**

**UNIT: 1**

**TOPIC: COMMUNICATION**

**OBJECTIVE:** To help employees see how effective communication is important to customers and fellow employees.

| DELIVERY METHOD | MATERIALS | NUMBER OF PARTICIPANTS | ESTIMATED DURATION |        |
|-----------------|-----------|------------------------|--------------------|--------|
| Activity        | None      | 5+ Participants        | <b>Discussion:</b> | 4 min. |
|                 |           |                        | <b>Set-up:</b>     | 1 min  |
|                 |           |                        | <b>Activity:</b>   | 5 min  |
|                 |           |                        | <b>Total:</b>      | 10 min |

**BREAKDOWN**

|   |
|---|
| <b>GOAL:</b>  |
| To play a game of “telephone” where the group passes information along that gets unclear and distorted.   |
| <b>INSTRUCTIONS:</b>  |
| <ol style="list-style-type: none"> <li>1. Ask the participants to sit in a circle.</li> <li>2. Have a typed up message that you whisper into a neighbor’s ear.</li> <li>3. The message will be passed around the circle, participant to participant, by whispering the message in a neighbor’s ear.</li> <li>4. When the message has gone around the whole circle, have the last participant say the message out loud so everyone can hear. (If necessary, read the original message to see how much the message got mixed up along the way)</li> </ol> |
| <b>INSTRUCTIONS:</b>  |
| <ol style="list-style-type: none"> <li>1. Why did the message get mixed up?</li> <li>2. How does this happen in your job, with internal and external customers?</li> <li>3. What could you do to prevent these types of mix ups from happening?</li> </ol>  |
| <b>TIPS, SUGGESTIONS, OR SOLUTIONS:</b>   |
| Start off with a very short message or story so everyone can understand the game, then you can make the message or story longer and longer. The longer the message or story, the funnier the end result will be.  |

**ACTIVITY 2**

**UNIT: 1**

**TOPIC: TEAMWORK**

**OBJECTIVE:** To learn about how everyone works together at Deseret Mutual and how important it is to listen and help each other to have a successful end result.

| DELIVERY METHOD | MATERIALS   | NUMBER OF PARTICIPANTS         | ESTIMATED DURATION |        |
|-----------------|---|--------------------------------|--------------------|--------|
| Activity        | 2 knives<br>bread<br>peanut-butter<br>jelly<br>plate<br>napkins<br>4 blindfolds | 6 Participants<br>1 Instructor | <b>Discussion:</b> | 7 min  |
|                 |   |                                | <b>Set-up:</b>     | 3 min  |
|                 |   |                                | <b>Activity:</b>   | 5 min  |
|                 |   |                                | <b>Total:</b>      | 20 min |

**BREAKDOWN**

**GOAL:**

Following all the rules and instructions, make a peanut-butter and jelly sandwich. The management team (2 participants) will tell the customer service representatives how to make the sandwich, the customer service representatives (2 participants) will make the sandwich, and then deliver it to the clients (2 participants), client1 (the employer) will feed it to client2 (the Deseret Mutual participant).

**INSTRUCTIONS:**

- Assign 6 participants to roles and give them each the following rules, based on their role:
  - 2 participants are the management team:
    - They can see
    - They can talk
    - They cannot use their hands/arms/etc.
  - 2 participants are the customer service representatives:
    - They cannot see
    - They can talk
    - One can use their right arm
    - One can use their left arm
  - 2 participants are the clients:
    - They cannot see
    - They can talk
    - One is the employer and can use their hands
    - One is the Deseret Mutual participant and cannot use their hands

## Welcome

2. Give them 5 minutes to make a peanut-butter and jelly sandwich and feed it to the client.

**INSTRUCTIONS:**

- What did you learn?
- What are the limitations of the management team, customer service representatives, and the clients (the employer and the Deseret Mutual participant)? Does this happen at Deseret Mutual?
- What are the advantages of the management team, customer service representatives, and the clients (the employer and the Deseret Mutual participant)? How can this help us at Deseret Mutual?
- Did you have fun?

**TIPS, SUGGESTIONS, OR SOLUTIONS:**

Talk with a participant before and ask them if they would be willing to eat part of a peanut butter and jelly sandwich for an activity. Chose that person as the Deseret Mutual participant. Also, be sure to have facilities for clean-up.

## ACTIVITY 3

### UNIT: 1

#### TOPIC: FINDING CREATIVE SOLUTIONS

**OBJECTIVE:** To work as a team to find creative solutions to a problem, using each others strengths to succeed.

| DELIVERY METHOD | MATERIALS    | NUMBER OF PARTICIPANTS | ESTIMATED DURATION |        |
|-----------------|--------------|------------------------|--------------------|--------|
| Activity        | Rope, string | 5+                     | <b>Total:</b>      | 20 min |
|                 |              |                        | <b>Set-up:</b>     | 5 min  |
|                 |              |                        | <b>Activity:</b>   | 10 min |
|                 |              |                        | <b>Discussion:</b> | 5 min  |

## BREAKDOWN

### GOAL:

To get the team of participants from one side of the spider web to the other side. Each hole in the spider web may only be used once and the participants can't touch the rope while moving through the holes.

### INSTRUCTIONS:

1. The Instructor should build a spider web with rope between 2 poles or trees. The spider web should have a number of different size holes. There should be 1 or 2 more holes than the number of participants you are expecting.
2. Start on one side of the spider web and tell the team their goal is to get all their team members from one side of the spider web to the other with the following rules:
  - a. Each hole may only be used once
  - b. No one may touch the rope, and if the rope is touched, then that member has to start over again
  - c. They have 10 minutes to get everyone through
3. Tell the team members to start. As the instructor, monitor and support them as they work to get everyone through the spider web.

### QUESTIONS:

1. What was your experience with the spider web?
2. What were your problems? How did you solve them?
3. Did anyone come up with any creative solutions? How?
4. Can we use the same processes at work?

### TIPS, SUGGESTIONS, OR SOLUTIONS:

Set up the spider web ahead of time, so that you are not spending time during your meeting setting it up.

---

**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides an orientation to the customer service training module. It also introduces Dan, a character who is created to represent a seasoned Deseret Mutual employee. Dan is dressed in a Deseret Mutual polo shirt and khaki pants and will introduce each of the units.*

**HOLE(S): PHOTO, AUDIO**

| IMAGE(S)                 | AUDIO  | LINKS | DIRECTIONS           |
|--------------------------|--|-------|----------------------|
| Image 1=<br>Photo of Dan | Audio 1=<br>Narration of on-<br>screen content | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

Welcome to the Deseret Mutual Customer Service Training! My name is Dan. I'm a fellow employee at Deseret Mutual, and I will be introducing each of the training units to you. At Deseret Mutual, our customers are one of the most important parts of our business, and serving them well requires developing a number of customer service skills.

This training provides an opportunity for you to learn new skills or just refresh your memory. To learn how to use this Customer Service Training, click on the forward arrow on the bottom right of the screen and let's get started!

---

**SCREEN NUMBER: 2**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen explains how the training is used and what it includes.*

**HOLE(S): PHOTO, AUDIO**

*When the look and feel is set, we suggest a screen capture of a sample content screen with links, pictures, etc. and highlight all the items that Dan talks about. Could link the screen capture as a pop-up to show different parts if necessary.*

| IMAGE(S)   | AUDIO  | LINKS | DIRECTIONS           |
|--|--|-------|----------------------|
| Image 1=<br>Photo of Dan<br><br>Image 2=<br>Screen capture of a<br>sample content<br>screen with links,<br>pictures, etc. and<br>highlight all the<br>items that Dan talks<br>about. | Audio 1=<br>Narration of on-<br>screen content | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**How to Use This Training**

This training program is simple and easy to use. Click your mouse on any [underlined word](#) to take you to more information, on a picture to hear or see more information, or on the forward arrow at the bottom of the screen to take you to the next screen. Instructions are included in the text when you need to click on something to learn more. Additional directions will show up at the bottom of the screen to help you remember what to do next. Throughout the training you will learn new information, see and hear examples, and practice with activities.

**SCREEN NUMBER: 3**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen explains the lay-out of the customer service training and explains each unit briefly.*

**HOLE(S): PHOTO, AUDIO**

| IMAGE(S)                 | AUDIO  | LINKS           | DIRECTIONS           |
|--------------------------|--|-----------------|----------------------|
| Image 1=<br>Photo of Dan | Audio 1=<br>Narration of first<br>paragraph of on-<br>screen content | → = Splash Page | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**[Audio 1]**

Your customer service computer training consists of 8 units and a glossary of terms. These units will help you review and learn important skills so you can provide exceptional customer service. Good luck and have fun! I will see you soon!

**[Text only]**

1. **Customers:** Identify Deseret Mutual Customers and their needs
2. **ACE:** Improve your employee performance by developing a positive attitude, confidence and empathy
3. **Building Relationships:** Build appropriate personal relationships with your customers
4. **Problem Solving:** Learn to solve problems that will help you meet the needs of your customers
5. **Effective Listening:** Expand your listening skills and improve your customer interactions
6. **Communicating Well:** Improve your communication skills and learn how to avoid communication problems
7. **Telephone Tactics:** Learn how to improve your telephone skills
8. **Written Correspondence:** Improve your written communication skills and serve your customers better

**Glossary:** This provides a list of terms we use at Deseret Mutual and how we should talk about them with our customers.



---

**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about who customers at Deseret Mutual are and what they expect. We show a graphic of our Deseret Mutual employee “Dan”. The graphic is accompanied by an audio file that narrates the content when the page is opened.*

**HOLE(S): PHOTO, AUDIO**

| IMAGE(S)                 | AUDIO  | LINKS | DIRECTIONS           |
|--------------------------|--|-------|----------------------|
| Image 1=<br>Photo of Dan | Audio 1=<br>Narration of on-<br>screen content | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

Deseret Mutual participants span the globe and come from every background and occupation imaginable! We are a unique service provider because of our participants’ diversity. It is impossible to lump all our customers together because they just aren’t all the same. Each department at Deseret Mutual serves different customers with different needs. Who are your customers? Why are they calling you? What are their frustrations? Understanding who we are helping and what they really want can help us make a difference. Deseret Mutual trusts us with the most precious commodity in their business – their customers. During this unit you will look at who your customers are and how you can better meet their needs.

---

**SCREEN NUMBER: 2**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: ACTIVITY**

*This screen gives examples of Deseret Mutual customers. They can put check marks by all the people they think are Deseret Mutual customers.*

**HOLE(S): CONTENT**

*Need a list of all the different customers (external and internal) that Deseret Mutual serves.*

| IMAGE(S) | AUDIO | LINKS                        | DIRECTIONS                     |
|----------|-------|------------------------------|--------------------------------|
| None     | None  | Submit=show<br>Feedback text | Click Submit when<br>finished. |

**CONTENT (APPEARS ON SCREEN):**

**Who are Deseret Mutual customers?**

Test your knowledge and see if you can identify which of the following people are Deseret Mutual participants:

- Disk Jockey
- Mission President
- University Professor
- Deseret Mutual Employee
- Farmer
- Janitor
- Parents of Missionary
- Michael Stapely
- Construction Worker
- Painter
- Missionary
- Student
- Customer Service Representative
- Homemaker
- Business Executive
- General Authority
- Football Player
- Etc....

**[Feedback]**

All of these people are Deseret Mutual participants! You can see that we really are serving a diverse group of customers.

---

**SCREEN NUMBER: 3**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about what Deseret Mutual Customers want and has a graphic of two hands shaking.*

**HOLE(S): GRAPHIC**

| IMAGE(S)                                    | AUDIO | LINKS | DIRECTIONS           |
|---|-------|-------|----------------------|
| Image 1=<br>Graphic of two<br>hands shaking | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**What Do Deseret Mutual Customers Want?**

A Deseret Mutual participant is more than a social security number, an information account, or a history of claims - every Deseret Mutual participant is a customer, a friend, and a part of our family. Deseret Mutual participants want to be heard, receive help or answers, and resolve their questions or problems. They also want to have a good experience as we help them solve their problems. As customer service representatives, you must exceed customer expectations by taking care of their needs while paying attention to their feelings. The first step to doing this is understanding who your customers are. Let's take a look at the customers you deal with everyday.

**SCREEN NUMBER: 4**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: CONTENT/EXAMPLES**

*This screen shows examples of Deseret Mutual customers. The examples are of customers that different departments deal with. There will be a number of pictures that you click on to take you to a pop-up screen profiling the customer.*

**HOLE(S): PHOTOS, CONTENT**

*Need Deseret Mutual to decide if you want more customers profiled, like mission president or parent of a missionary, etc.*

| IMAGE(S)  | AUDIO       | LINKS  | DIRECTIONS                                   |
|---|-------------|--|--|
| <p>Image 1=<br/>Photo of student participant, young male (18-24yrs) with book and a backpack</p> <p>Image 2=<br/>Photo of a surviving spouse, single female (50-65yrs)</p> <p>Image 3=<br/>Photo of an active employee, single man (30-45yrs)</p> <p>Image 4=<br/>Photo of retiree participant, man and a woman (65+yrs)</p> <p>Image 5=<br/>Photo of disabled participant, single woman (30-45yrs) in a wheelchair</p> <p>Image 6=<br/>Photo of internal customer, a man and a woman (20-45yrs) in Deseret Mutual shirts</p> | <p>None</p> | <p>Image 1= Screen 4A, pop-up</p> <p>Image 2= Screen 4B, pop-up</p> <p>Image 3= Screen 4C, pop-up</p> <p>Image 4= Screen 4D, pop-up</p> <p>Image 5= Screen 4E, pop-up</p> <p>Image 6 = Screen 4F, pop-up</p> | <p>Click on a picture to see an example.</p> |

**CONTENT (APPEARS ON SCREEN):**

Take a few minutes to familiarize yourself with some of Deseret Mutual's unique customers. Click on their pictures to learn more about them:

[Customer titles are in text below each picture]

[Student](#)

[Active Participant](#)

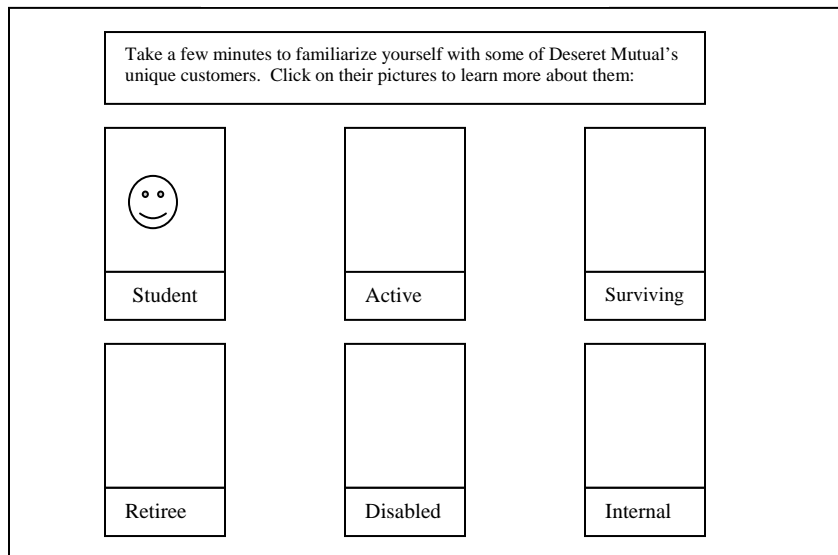
[Surviving Spouse](#)

[Retiree](#)

[Disabled Participant](#)

[Internal Customer](#)

What this screen should look like.



---

**SCREEN NUMBER: 4 - EXAMPLE**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: POP-UP**

*This screen is a template of an example profile of a participant at Deseret Mutual. This is to be used when additional customers are added to the unit.*

**HOLE(S): NONE**

| IMAGE(S)                         | AUDIO | LINKS | DIRECTIONS                 |
|----------------------------------|-------|-------|----------------------------|
| Image 1=<br>Photo of participant | None  | None  | Click Close when finished. |

**CONTENT (APPEARS ON SCREEN):**

Customer: Title

Age: Identify average customer age range

Typical problems:

- Identify the typical problems this customer has
- Etc.

Unique Circumstances: A brief sentence that describes what this person is going through and why we should be compassionate

Common Calls: List the top calls received from this customer

Close

**SCREEN NUMBER: 4A**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: POP-UP**

*This screen gives a profile of a student participant at Deseret Mutual.*

**HOLE(S): PHOTO, CONTENT**

*Review the information for this participant and add or delete to make sure it is accurate information regarding Deseret Mutual participants.*

| IMAGE(S)   | AUDIO | LINKS | DIRECTIONS                 |
|--|-------|-------|----------------------------|
| Image 1=<br>Photo of student participant, young male (18-24yrs) with book and a backpack | None  | None  | Click Close when finished. |

**CONTENT (APPEARS ON SCREEN):**

Customer: Student participant

Age: 18-24

Typical problems:

- Don't understand their benefits
- Found out they aren't covered for services that have been done
- Need to find out where to go for a procedure or how to make an appointment
- Don't know or understand premium or co-pay costs
- Forgot to pay bill

Unique Circumstances: A student participant is often on their own for the first time.

They are not experienced in taking care of themselves or their bills and are uncomfortable with the responsibility. They may be embarrassed by what they don't know or the mistakes they are bound to make.

Common Calls: A student participant is most often calling to find out about coverage and how the benefits and premiums work.

Close

---

**SCREEN NUMBER: 4B**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: POP-UP**

*This screen gives a profile of a surviving spouse participant at Deseret Mutual.*

**HOLE(S): PHOTO, CONTENT**

*Review the information for this participant and add or delete to make sure it is accurate information regarding Deseret Mutual participants.*

| IMAGE(S)  | AUDIO | LINKS | DIRECTIONS                 |
|---|-------|-------|----------------------------|
| Image 1=<br>Photo of a surviving spouse, single female (50-65yrs) | None  | None  | Click Close when finished. |

**CONTENT (APPEARS ON SCREEN):**

Customer: Surviving Spouse

Age: 20-100

Typical problems:

- Claim isn't paid the way they expected
- Claim is denied
- Don't understand their benefits

Unique Circumstances: Surviving spouses may be dealing with insurance claims and benefits for the first time since the death of their spouse. They may not understand their insurance policy or claims and benefits.

Common Calls: A surviving spouse is most often calling for clarification and understanding of policy or benefits.

Close



**SCREEN NUMBER: 4C**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: POP-UP**

*This screen gives a profile of an active employee participant at Deseret Mutual.*

**HOLE(S): PHOTO, CONTENT**

*Review the information for this participant and add or delete to make sure it is accurate information regarding Deseret Mutual participants.*

| IMAGE(S)   | AUDIO | LINKS | DIRECTIONS                 |
|--|-------|-------|----------------------------|
| Image 1=<br>Photo of an active employee, single man (30-45yrs) | None  | None  | Click Close when finished. |

**CONTENT (APPEARS ON SCREEN):**

Customer: Active Employee

Age: 20-65

Typical Problems:

- Claim isn't paid the way they expected
- Claim is denied
- Don't understand their benefits

Unique Circumstances: An active employee is busy trying to balance work and family.

When there are frustrations and complications with their insurance claims, they don't feel like they have the time to take care of or understand their claims.

Common Calls: An active employee is most often calling because they are frustrated about a claim.

Close

**SCREEN NUMBER: 4D**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: POP-UP**

*This screen gives a profile of a retired participant at Deseret Mutual.*

**HOLE(S): PHOTO, CONTENT**

*Review the information for this participant and add or delete to make sure it is accurate information regarding Deseret Mutual participants.*

| IMAGE(S)   | AUDIO | LINKS | DIRECTIONS                    |
|--|-------|-------|-------------------------------|
| Image 1=<br>Photo of retiree<br>participants, man<br>and a woman<br>(65+yrs) | None  | None  | Click Close when<br>finished. |

**CONTENT (APPEARS ON SCREEN):**

Customer: Retiree

Age: 65+

Typical Problems:

- Don't understand their benefits or claims
- Frustrated with their coverage or co-pays
- Frustrated with themselves for slowing down and not understanding things
- Frustrated with any cutbacks in benefits

Unique Circumstances: Retired participants are getting older and not only are they frustrated with problems in their accounts, but they are frustrated with themselves when they don't understand or begin to forget things. They may be mean and ornery when they feel like they are missing something or can't understand.

Common Calls: A retired participant is most often calling because they need to understand a claim or payment.

Close

**SCREEN NUMBER: 4E**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: POP-UP**

*This screen gives a profile of a disabled employee at Deseret Mutual.*

**HOLE(S): PHOTO, CONTENT**

*Review the information for this participant and add or delete to make sure it is accurate information regarding Deseret Mutual participants.*

| IMAGE(S)   | AUDIO | LINKS | DIRECTIONS                 |
|--|-------|-------|----------------------------|
| Image 1=<br>Photo of disabled participant, single woman (30-45yrs) in a wheelchair | None  | None  | Click Close when finished. |

**CONTENT (APPEARS ON SCREEN):**

Customer: Disabled Participant

Age: any age

Typical Problems:

- Claim isn't paid the way they expected
- Claim is denied
- Need help sifting through all the claims and payments they need to make

Unique Circumstances: Disabled participants are not only dealing with physical and emotional difficulties, they also have an enormous amount of bills and paperwork they have to take care of. Often they do not have a lot of money and are trying to make ends meet while also keeping up on all their medical co-pays and bills.

Common Calls: A disabled participant is most often calling because they need information about balances and payments.

Close

**SCREEN NUMBER: 4F**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: POP-UP**

*This screen gives a profile of an internal customer at Deseret Mutual.*

**HOLE(S): PHOTO, CONTENT**

*Add information for this participant and make sure it is accurate information regarding Deseret Mutual internal customers.*

| IMAGE(S)  | AUDIO | LINKS | DIRECTIONS                 |
|---|-------|-------|----------------------------|
| Image 1=<br>Photo of internal customers, a man and a woman (20-45yrs) in Deseret Mutual shirts<br><br>Image 2=<br>Graphic of a button that says "close" | None  | None  | Click Close when finished. |

**CONTENT (APPEARS ON SCREEN):**

Customer: Internal Customer

Age:

Typical Problems:

Unique Circumstances:

Common Calls:

Close

**SCREEN NUMBER: 5**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen presents the topic of dealing with common customer behaviors. This screen identifies the behaviors and provides links to information on that behavior.*

**HOLE(S): GRAPHIC**

*The graphic is a collage of all the different graphics for customer behaviors, overlapping each other on the corners for aesthetics. Not all of the graphics have to fit in the collage.*

*\*Note: If desired, this screen could not link out to individual screens, and could follow a linear progression of content screens for each behavior.*

| IMAGE(S)  | AUDIO | LINKS  | DIRECTIONS                            |
|---|-------|--|---------------------------------------|
| Image 1=<br>Graphic of the graphics used in Screens 5A-5I collaged together | None  | Complaining Customer=Screen 5A<br><br>Aging Customer =Screen 5B<br><br>Angry Customer =Screen 5C<br><br>Talkative Customer =Screen 5D<br><br>Demanding or Abusive Customer =Screen 5E<br><br>Flirty Customer =Screen 5F<br><br>Customer with a heavy accent or poor English skills=Screen 5G<br><br>Quiet Customer=Screen 5H<br><br>Argumentative Customer=Screen 5I | Click on a <u>Link</u> to learn more. |

**CONTENT (APPEARS ON SCREEN):**

**Common Customer Behaviors**

You can see that at Deseret Mutual you are dealing with a broad range of customers. On any given day, any one of your customers may exhibit behaviors that aren't easy to deal with. Let's take a look at difficult customer situations and behaviors that you may encounter:

[Complaining Customer](#)

[Aging Customer](#)

[Angry Customer](#)

[Talkative Customer](#)

[Demanding or Abusive Customer](#)

[Flirty Customer](#)

[Customer with a heavy accent or poor English skills](#)

[Quiet Customer](#)

[Argumentative Customer](#)

**SCREEN NUMBER: 5A**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with complaining participants. There is a self-assessment check box quiz that has no “right” answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.*

*\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add or delete to make sure it is accurate information regarding problematic behaviors with participants. Add to the list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)                          | AUDIO | LINKS                        | DIRECTIONS                 |
|-----------------------------------|-------|------------------------------|----------------------------|
| Image 1= Graphic of a ranting man | None  | Submit=show<br>Feedback text | Click Submit when finished |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Chris Complaining

**Customer behavior:** Chronic Complainer

**Needs:** Chris needs to tell you everything he thinks is wrong with you, Deseret Mutual, and Utah, all in one call.

**Major problems:** Chris has a hard time understanding changes in his policy

**What it would be like to be in their shoes:** Chris has had a difficult and long day at work, he feels overloaded, and to top it all off, he gets a letter from Deseret Mutual denying a large claim he made.

How could you respond to Chris? (*provide tips and easy solutions*)

- Listen and empathize with Chris.
- Ask him what you can do to help him today.
- Tell him you will help him to understand the letter and what it means.
- Speak calmly and address his most important issue.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.

**SCREEN NUMBER: 5B**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with elderly participants. There is a self-assessment check box quiz that has no “right” answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.*

*\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add or delete to make sure it is accurate information regarding problematic behaviors with participants. Add to the list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)                        | AUDIO | LINKS                     | DIRECTIONS                  |
|---------------------------------|-------|---------------------------|-----------------------------|
| Image 1= Graphic of an old lady | None  | Submit=show Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Agnes Aged

**Customer behavior:** Aging Participant

**Needs:** Agnes needs to request life insurance payment for her husband who died.

**Major problems:** Agnes is older, emotional and can't hear you over the phone.

**What it would be like to be in their shoes:** Agnes' husband of 55 years just died and left her alone. He always took care of everything and now she has to try to figure everything out and handle it alone. She is sad about losing him and can't find any policies, information, etc. in his papers. She knows they have life insurance, but can't find the policy. She can't hear, can barely see, and is frustrated with feeling so incompetent.

How could you respond to Agnes?

- Listen and sympathize with Agnes.
- Speak slowly and loudly.
- Send her the information she asks for and a checklist of what to do.
- Ask if there is anyone else you can also send the information to so they can help her.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.



---

**SCREEN NUMBER: 5C**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with angry participants. There is a self-assessment check box quiz that has no “right” answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.*

*\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add information regarding problematic behaviors with participants. Create a list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)                           | AUDIO | LINKS                        | DIRECTIONS                  |
|------------------------------------|-------|------------------------------|-----------------------------|
| Image 1= Graphic of a man growling | None  | Submit=show<br>Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Adam Anger

**Customer behavior:** Angry Customer

**Needs:**

**Typical problems:**

**What would it be like to be in their shoes:**

How could you respond to Adam?

- List of tips and solutions
- Etc.
- Etc.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.

**SCREEN NUMBER: 5D**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with talkative participants. There is a self-assessment check box quiz that has no “right” answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.*

*\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add information regarding problematic behaviors with participants. Create a list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)  | AUDIO | LINKS                     | DIRECTIONS                  |
|---|-------|---------------------------|-----------------------------|
| Image 1= Graphic of a lady talking into the phone | None  | Submit=show Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Cynthia Chatty

**Customer behavior:** Talkative Customer

**Needs:**

**Typical problems:**

**What would it be like to be in their shoes:**

How could you respond to Cynthia?

- List of tips and solutions
- Etc.
- Etc.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.

**SCREEN NUMBER: 5E**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with demanding or abusive participants. There is a self-assessment check box quiz that has no “right” answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.*

*\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add information regarding problematic behaviors with participants. Create a list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)                          | AUDIO | LINKS                     | DIRECTIONS                  |
|-----------------------------------|-------|---------------------------|-----------------------------|
| Image 1= Graphic of a man yelling | None  | Submit=show Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Dan Demanding

**Customer behavior:** Demanding or Abusive Customer

**Needs:**

**Typical problems:**

**What would it be like to be in their shoes:**

How could you respond to Dan?

- List of tips and solutions
- Etc.
- Etc.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.

**SCREEN NUMBER: 5F**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with flirty participants. There is a self-assessment check box quiz that has no “right” answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.*

*\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add information regarding problematic behaviors with participants. Create a list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)  | AUDIO | LINKS                        | DIRECTIONS                  |
|---|-------|------------------------------|-----------------------------|
| Image 1= Graphic of coy looking lady with big eyelashes | None  | Submit=show<br>Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Fannie Flirt

**Customer behavior:** Flirty customer

**Needs:**

**Typical problems:**

**What would it be like to be in their shoes:**

How could you respond to Fannie?

- List of tips and solutions
- Etc.
- Etc.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.

**SCREEN NUMBER: 5G**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with participants with accents. There is a self-assessment check box quiz that has no “right” answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.*

*\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add information regarding problematic behaviors with participants. Create a list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)   | AUDIO | LINKS                        | DIRECTIONS                  |
|--|-------|------------------------------|-----------------------------|
| Image 1= Graphic of a man with foreign words coming out of his mouth | None  | Submit=show<br>Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Alberto Accento

**Customer behavior:** Customer with heavy accent or poor English skills

**Needs:**

**Typical problems:**

**What would it be like to be in their shoes:**

How could you respond to Alberto?

List of tips and solutions

Etc.

Etc.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.

**SCREEN NUMBER: 5H**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with participants who don't talk much on the phone. There is a self-assessment check box quiz that has no "right" answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.*

*\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add information regarding problematic behaviors with participants. Create a list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)  | AUDIO | LINKS                     | DIRECTIONS                  |
|---|-------|---------------------------|-----------------------------|
| Image 1= Graphic of a man very shy looking with mouth zipped shut | None  | Submit=show Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Timothy Talkless

**Customer behavior:** Quiet Customer

**Needs:**

**Typical problems:**

**What would it be like to be in their shoes:**

How could you respond to Timothy?

- List of tips and solutions
- Etc.
- Etc.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.

**SCREEN NUMBER: 51**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains a customer profile for dealing with argumentative participants. There is a self-assessment check box quiz that has no “right” answers, and just gives suggestions. When clicking on the submit button, an example is displayed on the screen.  
\*Ideal for audio in the future*

**HOLE(S): GRAPHICS, CONTENT**

*Review the information for this participant and add information regarding problematic behaviors with participants. Create a list of tips and suggestions of how to respond to this customer. Provide a quote from an employee talking about how they successfully dealt with a customer like this.*

| IMAGE(S)   | AUDIO | LINKS                        | DIRECTIONS                  |
|--|-------|------------------------------|-----------------------------|
| Image 1= Graphic of an unhappy lady talking into the phone | None  | Submit=show<br>Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Name:** Alexis Argument

**Customer behavior:** Argumentative Customer

**Needs:**

**Typical problems:**

**What would it be like to be in their shoes:**

How could you respond to Timothy?

- List of tips and solutions
- Etc.
- Etc.

**[Feedback]**

Include a quote from a Deseret Mutual employee who has recently dealt with a customer like this and what suggestions they have.

---

**SCREEN NUMBER: 6**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen is a review of what we have talked about in this unit.*

**HOLE(S): GRAPHIC**

| IMAGE(S)                      | AUDIO | LINKS           | DIRECTIONS           |
|-------------------------------|-------|-----------------|----------------------|
| Image 1=<br>Big red checkmark | None  | → = Splash Page | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Review**

It's easy to see that at Deseret Mutual we have a diverse group of participants. It is important to know who you are dealing with and what you can do to meet their needs. Each customer has their own unique situation, but they can all display difficult behaviors. It is important to try and understand where a customer is coming from and then take one of many good steps toward helping solve their problems. Taking care of every participant allows Deseret Mutual to become the best benefits provider on the face of the earth, one customer at a time! Follow these key suggestions when dealing with your customers:

- Listen
- Remain calm
- Ask questions to understand your customer and their situation
- Care about your customers' needs
- Educate your customer about their policy and benefits, and what you can do to help them
- Treat your customers with respect



**Unit 1: Customers**

**Suggestions for Instructor Led Activities:**

1. Give employees a difficult customer behavior and have them role play a phone call with a fellow employee. Talk about what the CSR did to handle the difficult behavior.
2. Ask employees to share their experiences with difficult customer behaviors and what they did to handle the situation. List these on the board and ask for any additional suggestions.

---

**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about confidence, attitude and empathy and how they help Deseret Mutual employees serve customers. We show a graphic of our Deseret Mutual employee “Dan”. The graphic is accompanied by an audio file that narrates the content when the page is opened.*

**HOLE(S): AUDIO, PHOTO**

| <b>IMAGE(S)</b>          | <b>AUDIO</b>                                  | <b>LINKS</b> | <b>DIRECTIONS</b>    |
|--------------------------|---|--------------|----------------------|
| Image 1=<br>Photo of Dan | Audio 1= Narration<br>of on-screen<br>content | None         | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

At Deseret Mutual we do much more than answer questions: we are the image, the voice and the answers of Deseret Mutual for our customers. This isn't a simple job! How we speak to our customers shows how we feel as an employee of Deseret Mutual, as well as an individual. We want to show our customers that we are happy and confident in what we do and who we are. That doesn't mean we have to know everything, but it does mean that we can speak and act with a purpose, showing our customers that we mean business, and we mean quality business. This unit will focus on helping you develop and show a positive Attitude, Confidence, and Empathy to your customers, so you can become an ACE employee.

**SCREEN NUMBER: 2**

**TEMPLATE TYPE: CS-3A**

**FUNCTIONALITY: CONTENT**

*This screen gives them three ways to be an ACE employee.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS   | DIRECTIONS                                     |
|----------|-------|---|--|
| None     | None  | Attitude= Screen 2A-1<br><br>Confidence= Screen 2B-1<br><br>Empathy= Screen 2C-1<br><br>Satisfaction= Screen 2D-1 | Click on a <a href="#">Link</a> to learn more. |

**CONTENT (APPEARS ON SCREEN):**

**Ways to be an ACE Employee**

In order to be the best benefits administrator, we need to have satisfied customers. Your attitude, confidence and empathy significantly impact your customers' satisfaction, as the formula below demonstrates. Click on each word to learn how you can be an ACE employee!

$$\underline{\text{ATTITUDE}} + \underline{\text{CONFIDENCE}} + \underline{\text{EMPATHY}} = \underline{\text{SATISFACTION}}$$

**SCREEN NUMBER: 2A-1**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: EXAMPLE**

*This screen is an example of a Deseret Mutual employee showing a positive attitude and a negative attitude in a conversation with an employee.*

**HOLE(S): AUDIO, PHOTO**

*The audio conversation is the same script, read twice, once with the Customer Service Representative having a positive attitude and one where they have a negative attitude.*

| IMAGE(S)   | AUDIO  | LINKS  | DIRECTIONS                             |
|--|--|--|--|
| Image 1=<br>Photo of CSR1 with a positive/happy/ smile look<br><br>Image 2= Photo of CSR1 with a negative/ not happy/scowl | Audio 1=<br>Conversation between CSR1 and DMP1 where DMP1 is asking a question and the CSR1 has a positive attitude<br><br>Audio 2=<br>Conversation between CSR1 and DMP1 where DMP1 is asking a question and the CSR1 has a negative attitude | Image 1= play Audio 1<br><br>Image 2= play Audio 2 | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

A positive attitude can make a difference. Click on the pictures below to listen to the two conversations and see if you can identify how your attitude influences what your customers hear over the phone.

---

**SCREEN NUMBER: 2A-2**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen includes content about why attitude is important and a picture of a Deseret Mutual employee with a quote.*

**HOLE(S): PHOTO, EXAMPLE**

| IMAGE(S)                 | AUDIO | LINKS | DIRECTIONS           |
|--------------------------|-------|-------|----------------------|
| Image 1=<br>Photo of CSR | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Why is Your Attitude Important?**

Attitudes are contagious! It is difficult to deliver exceptional customer service when your mind and emotions are still mulling over your last call or conversation. A customer service representative that is inattentive or has a negative attitude leaves a customer feeling worse than before they called and that feeling comes back up each time they think of the call and subsequently, the company. A contagious attitude can spread a smile across the phone, or leave someone wishing they had never called. Which attitude do you want to spread to your customers?

**[Sidebar]**

Include a Deseret Mutual employee quote about how they work to have a good attitude even on “bad” days.

---

**SCREEN NUMBER: 2A-3**

**TEMPLATE TYPE: CS-3A**

**FUNCTIONALITY: CONTENT**

*This screen includes content on developing and showing a good attitude*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 2 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**How Can You Develop and Show a Good Customer Service Attitude?**

**You can develop a good customer service attitude by:**

- Caring about your customer
- Focusing on your customer
- Asking questions to understand your customer's situation
- Evaluating the situation from a neutral angle
- Having patience
- Taking short breaks to calm down and focus
- Sharing your frustrations with family, friends, and co-workers at appropriate times

**You show a good customer service attitude by:**

- Your tone
- Your conversation
- Listening to the whole story
- Treating the customer as you would want to be treated

Your attitude towards a customer affects their overall experience with Deseret Mutual. You develop a customer service attitude when you care about your customer. Care enough to choose a positive attitude. Following these simple suggestions will help you to be an ACE employee.

**SCREEN NUMBER: 2B-1**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: EXAMPLE**

*This screen has an example of a Deseret Mutual employee in a conversation being confident and not confident in the same situation.*

**HOLE(S): AUDIO, PHOTO**

| IMAGE(S)   | AUDIO   | LINKS  | DIRECTIONS                                |
|--|---|--|---|
| Image 1=<br>Photo of CSR1<br>physically showing<br>confidence/<br>shoulders up/<br>smiling | Audio 1=<br>Conversation<br>between CSR1 and<br>DMP1 where CSR1<br>solves a problem<br>with confidence    | Image 1= play<br>Audio 1<br><br>Image 2= play<br>Audio 2 | Click on a picture to<br>hear an example. |
| Image 2= Photo of<br>CSR1 not<br>confident/slumped/<br>nervous                             | Audio 2=<br>Conversation<br>between CSR1 and<br>DMP1 where CSR1<br>solves a problem<br>without confidence |  |   |

**CONTENT (APPEARS ON SCREEN):**

Confidence helps your customer trust you and what you have to tell them. Click on the pictures below to listen to two conversations to see if you can hear how confidence can be detected over the phone.

**SCREEN NUMBER: 2B-2**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen describes how confidence affects our work. It includes a picture of a Deseret Mutual employee and a quote.*

**HOLE(S): PHOTO, EXAMPLE**

| IMAGE(S)              | AUDIO | LINKS | DIRECTIONS           |
|-----------------------|-------|-------|----------------------|
| Image 1= Photo of CSR | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Why is Confidence Important?**

Confidence is important because it affects your work. Your level of confidence affects how you deal with your customer. Just like attitude, your confidence is evident in your tone, your conversation and what you do for your customer. Perception is as important as action. If your customer sees, believes, and understands that you are confident in your ability to help them, then regardless of the final outcome, they will probably be more satisfied with their experience at Deseret Mutual.

**[Sidebar]**

Picture of Deseret Mutual employee with a quote describing how confidence affects their work



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**SCREEN NUMBER: 2B-3**

**TEMPLATE TYPE: CS-3A**

**FUNCTIONALITY: CONTENT**

*This screen includes content about developing and showing confidence to customers*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 2 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**How Can You Develop and Show Confidence?**

**You can develop confidence by:**

- Practicing
- Knowing your job and what you are talking about
- Emulating others
- Accepting help and feedback from others
- Preparing to accept failure because it will pave your way to success

**You can show confidence by:**

- Speaking clearly
- Pausing and being assertive, but gentle in conversations
- Knowing what you're talking about, and if you don't, find out before telling your customer

Customer service confidence isn't created overnight, but you can develop it over time. Using these tips will help you to focus on increasing your confidence in yourself and your work, helping you to become an ACE employee.

**SCREEN NUMBER: 2C-1**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: EXAMPLE**

*This screen has an example of a Deseret Mutual employee in a conversation showing empathy and no empathy in a situation.*

**HOLE(S): AUDIO, PHOTO**

| IMAGE(S)   | AUDIO   | LINKS  | DIRECTIONS                                |
|--|---|--|---|
| Image 1=<br>Photo of CSR1<br>attentive/<br>concerned/pleasant                      | Audio 1=<br>Conversation<br>between CSR1 and<br>DMP1 where CSR1<br>shows empathy    | Image 1= play<br>Audio 1<br><br>Image 2= play<br>Audio 2 | Click on a picture to<br>hear an example. |
| Image 2= Photo of<br>CSR1 not paying<br>attention /not caring/<br>slightly annoyed | Audio 2=<br>Conversation<br>between CSR1 and<br>DMP1 where CSR1<br>shows no empathy |  |   |

**CONTENT (APPEARS ON SCREEN):**

Empathy makes your customer feel safe in telling you their problem or situation. Listen to two conversations by clicking on the pictures below and see if you can hear how your customers can sense your level of empathy over the phone.

**SCREEN NUMBER: 2C-2**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen includes content about what empathy is and why empathy is important. The screen includes a picture of a Deseret Mutual employee with a quote.*

**HOLE(S): PHOTO, EXAMPLE**

| IMAGE(S)              | AUDIO | LINKS | DIRECTIONS           |
|-----------------------|-------|-------|----------------------|
| Image 1= Photo of CSR | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**What Is Empathy and Why Is It Important?**

Empathy is the ability to put yourself in others' situations and share their thoughts and feelings, as well as see things from their point of view. Empathy means acknowledging and affirming another's emotional state without owning their emotions. At Deseret Mutual, we want you to be emotionally aware and sensitive without becoming too emotionally involved. By showing empathy, you can stay calm and in control of the situation. Remember that people don't care how much you know until they know how much you care. Show that you care through empathy. Once a customer knows that you care, they will trust you with their problems and remember the positive, uplifting experience you provided.

**[Sidebar]**

Picture of Deseret Mutual employee with a quote describing how empathy helps them with customers

[Reference at bottom of screen]

(Taken from Anderson & Zemke, *Delivering Knock Your Socks Off Service*, Revised Edition, 1998)

**SCREEN NUMBER: 2C-3**

**TEMPLATE TYPE: CS-3A**

**FUNCTIONALITY: CONTENT**

*This screen includes content about developing and showing empathy to customers.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 2 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**How Can You Develop and Show Empathy?**

**You can develop empathy by:**

- Thinking how you would react or feel in the situation
- Recognizing your customers' emotional state
- Being emotionally aware and sensitive without becoming too emotionally involved
- Listening to what your customers are feeling as well as what they are saying

**You can show empathy by:**

- Telling others that you understand how they feel (if you do)
- Trying to understand your customers' feelings.
- Sharing your similar experiences
- Staying calm and in control of the situation
- Being appropriate, respectful and sensitive to the topic

These helpful hints will improve your customer relationships and help you become an ACE employee.

[Reference at bottom of screen]

(Taken from Anderson & Zemke, *Delivering Knock Your Socks Off Service*, Revised Edition, 1998)

---

**SCREEN NUMBER: 2D-1**

**TEMPLATE TYPE: CS-5A**

**FUNCTIONALITY: EXAMPLES**

*This screen gives 2 examples of Deseret Mutual satisfied customers with quotes about their experience.*

*\*Ideal for audio/video in the future*

**HOLE(S): PHOTOS, EXAMPLES**

*The examples are actual quotes from Deseret Mutual customers describing positive experiences with Deseret Mutual, specifically focusing on attitude, confidence and empathy.*

| IMAGE(S)               | AUDIO | LINKS        | DIRECTIONS           |
|------------------------|-------|--------------|----------------------|
| Image 1= Photo of DMP1 | None  | → = Screen 2 | Click → to continue. |
| Image 2= Photo of DMP2 |       |              |                      |

**CONTENT (APPEARS ON SCREEN):**

Being an ACE employee helps you to succeed, and your positive attitude, confidence and empathy will make an impact on a customer's experience. Take a look at two Deseret Mutual customers who were satisfied with the ACE employees who helped them.

**[Text Fields]**

Include two quotes from Deseret Mutual participants talking about a good experience with a Deseret Mutual employee who had a positive attitude and/or showed confidence and/or demonstrated empathy.

### SCREEN NUMBER: 3

TEMPLATE TYPE: TO BE DEVELOPED

FUNCTIONALITY: ACTIVITY

*This screen is an activity providing participants with an opportunity to reflect on what they have learned. Participants are asked to listen to an example phone call and answer questions. Answers are not “graded”, but general feedback is provided.*

*\*Ideal for video in the future*

### HOLE(S): GRAPHIC, AUDIO

*Feel free to use or delete any of the items in the checklist as you create the example, or use the script from an actual Deseret Mutual call.*

| IMAGE(S)                                | AUDIO  | LINKS                        | DIRECTIONS   |
|---|--|------------------------------|--|
| Image 1=<br>Graphic for Activity screen | Audio 1=<br>Conversation between CSR1 and DMP1, a poor phone call with the bold tips below emphasized. | Submit=show<br>Feedback text | Click on a picture to hear an example and then click Submit when finished. |

### CONTENT (APPEARS ON SCREEN):

#### Activity

Click on the photo to hear a conversation and identify what this customer service representative did that made this call a poor experience for the customer.

#### [Check Box]

Check all that apply:

- Didn't know what they were talking about**
- Didn't speak clearly
- Was harsh and aggressive
- Failed to recognize the customers' emotional state**
- Became emotionally involved
- Pretended to understand how they felt
- Didn't try to understand their feelings
- Got upset and lost control of the situation
- Wasn't sensitive to the topic**
- Didn't focus on the customer
- Failed to ask questions to understand their situation**
- Had a frustrated tone**
- Didn't listen to the whole story**

**[Feedback]**

This customer service representative didn't know what he was talking about, he failed to recognize the customer was upset, failed to ask questions to understand the customer's situation, wasn't sensitive to the situation, didn't listen to the customer's whole story, and had an obviously frustrated tone.

**SCREEN NUMBER: 4**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This screen is an activity providing participants with an opportunity to reflect on what they have learned. Participants are asked to listen to an example phone call and answer questions. Answers are not “graded”, but general feedback is provided.*

*\*Ideal for video in the future*

**HOLE(S): GRAPHIC, AUDIO**

*Feel free to use or delete any of the items in the checklist as you create the example, or use the script from an actual Deseret Mutual call.*

| IMAGE(S)                                | AUDIO  | LINKS                        | DIRECTIONS   |
|---|--|------------------------------|--|
| Image 1=<br>Graphic of Activity<br>Icon | Audio<br>1=Conversation<br>between CSR1 and<br>DMP1, a good<br>phone call with the<br>bold tips below<br>emphasized. | Submit=show<br>Feedback text | Click on a picture to<br>hear an example<br>and then click<br>Submit when<br>finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

Click on the photo to hear a conversation and identify what made this an ACE call.

**[Check Box]**

**Check all that apply:**

- Ask questions to understand their situation.**
- Listen to the whole story
- Know what you are talking about
- Speak clearly**
- Pause and be assertive but gentle in conversations
- Recognize your customers’ emotional state**
- Be emotionally aware and sensitive without becoming too emotionally involved
- Tell others that you understand how they feel (if you do)**
- Share your similar experiences**
- Stay calm and in control of the situation
- Be appropriate, respectful and sensitive to the topic**



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**[Feedback]**

This customer service representative asked questions to understand the customers' situation; they spoke clearly, recognized the customer was upset, told them they understood their feelings and related an appropriate similar experience.

**SCREEN NUMBER: 5**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen is a content screen that lists different tips to being an ACE employee.*

**HOLE(S): GRAPHIC**

| IMAGE(S)                      | AUDIO | LINKS           | DIRECTIONS           |
|-------------------------------|-------|-----------------|----------------------|
| Image 1=<br>Big red checkmark | None  | → = Splash Page | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Review**

At Deseret Mutual you want to guarantee your customers' satisfaction. In order for that to happen, follow some of the tips we have discussed throughout this unit and start working towards using your attitude, confidence and empathy to become an ACE employee.

**You can develop and show a good customer service attitude by:**

- Caring about and focusing on your customer
- Asking questions to understand you customers' situation
- Evaluating the situation from a neutral angle
- Having patience
- Taking short breaks to calm down and focus and sharing your frustrations at appropriate times
- Listening to the whole story
- Treating the customer as you would want to be treated

**You can develop and show confidence by:**

- Emulating others
- Accepting help and feedback from others
- Preparing to accept failure because it will pave your way to success
- Speaking clearly
- Pausing and being assertive, but gentle in conversations
- Knowing what you're talking about, and if you don't, find out before telling your customer

**You can develop and show empathy by:**

- Thinking how you would react or feel in the situation
- Being emotionally aware and sensitive without becoming too emotionally involved
- Listening to what they are feeling as well as what they are saying

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- Trying to understand your customers' feelings
- Sharing your similar experiences
- Staying calm and in control of the situation
- Being appropriate, respectful and sensitive to the topic

**Suggestions for Instructor Led Activities:**

1. Give participants a skill (attitude, confidence, or empathy) ask them to act it poorly and have them role play a generic conversation with a fellow employee.
2. Script a generally good generic conversation with a few minor problems in attitude, confidence, and empathy and ask the participants to identify what was done wrong or what could be done better.
3. Ask employees for experiences where they were able to use their attitude, confidence and empathy to help customers. Discuss experiences and help employees to identify what things they did to help themselves.

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**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about why building relationships is important to Deseret Mutual. On screen is a graphic of our Deseret Mutual Customer Service Representative “Dan” who narrates the content when the page is opened.*

**HOLE(S): AUDIO, PHOTO**

| IMAGE(S)                | AUDIO                                     | LINKS | DIRECTIONS           |
|-------------------------|---|-------|----------------------|
| Image 1 = Photo of Dan. | Audio 1 = Narration of on-screen content. | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Why Build Relationships?**

Our goal to be the best benefits provider on the face of the earth will not be reached until our customers believe that we *are* the best benefits provider. Our customers create their image of our company based on how we treat them. Building lasting, personal relationships with customers is a critical way to help them positively perceive our company. Our relationships with our customers also influence our customers’ decision to keep their business with us.

The goal of this unit is to help you understand how to create and maintain lasting relationships with your customers. Specifically, you will gain knowledge of the differences between personal and professional relationships as well as behaviors that strengthen relationships.

---

**SCREEN NUMBER: 2**

**TEMPLATE TYPE: CS-3A**

**FUNCTIONALITY: CONTENT**

*This screen explains the difference between personal and professional relationships.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS | DIRECTIONS           |
|----------|-------|-------|----------------------|
| None     | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Personal vs. Professional Relationships**

A professional relationship is one that has business as its only goal. Your focus in a professional relationship is on discovering and meeting needs, handling concerns, and other business-related tasks. By default, every business interaction involves relating to customers on a professional level. However, exceptional customer service doesn't come from professional relationships alone. A personal relationship is necessary for customer service excellence.

Personal relationships lead to better customer service. Each customer is unique and should be treated as such. As customers call or come in with problems or concerns, they want to converse with a friend that they trust. Therefore, you need to have a personal relationship with your customers. To acquire a personal relationship, interact at the personal level. Conversing on both personal and professional levels is our next topic.

**SCREEN NUMBER: 3**

**TEMPLATE TYPE: CS-7A**

**FUNCTIONALITY: CONTENT**

*This screen explains how to have a personal and professional relationship in a conversation.*

**HOLE(S): GRAPHIC**

*Graphic of personal/professional level chart (see page 4).*

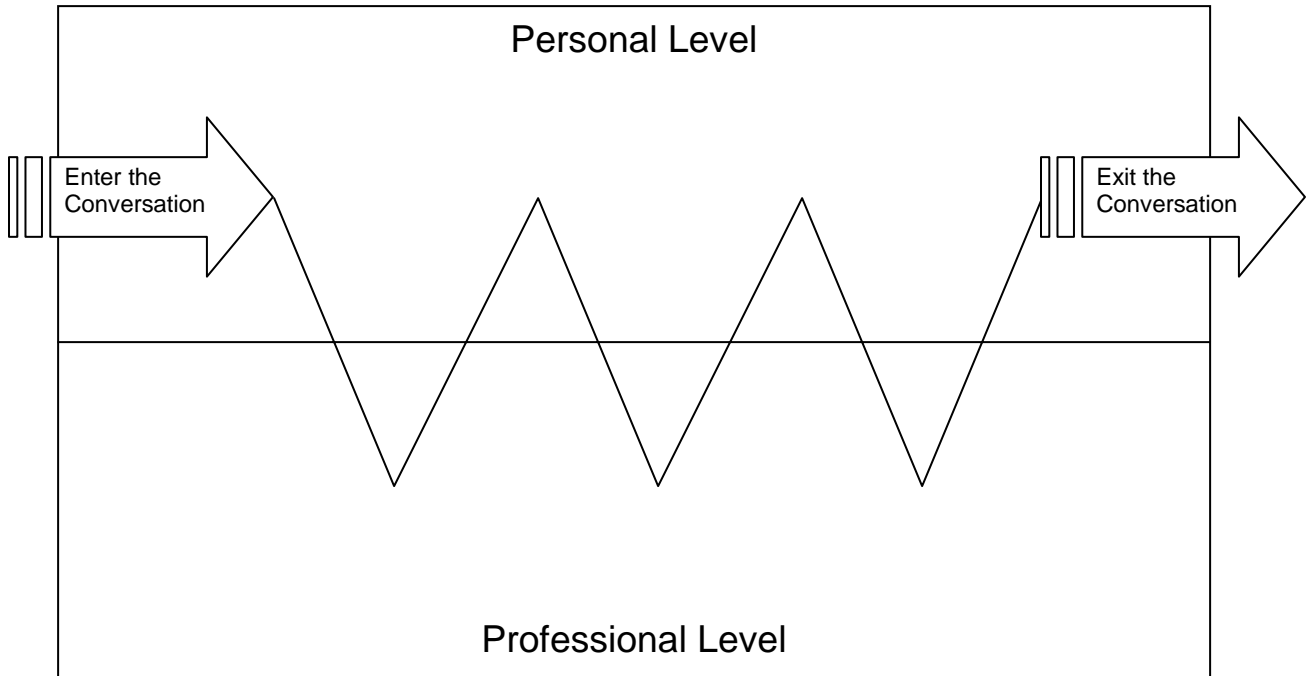
| IMAGE(S)   | AUDIO | LINKS | DIRECTIONS           |
|--|-------|-------|----------------------|
| Image 1 = Chart of personal and professional levels on page 4. | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Conversing on Personal and Professional Levels**

Your conversations with customers should include aspects of both types of relationships. Think of your conversations having two distinct levels—a personal level and a professional level. Talking at the personal level means you personalize your conversations. Talking at the professional level means you accomplish the business related to your conversations.

Begin your conversations on the personal level. This means that you get to know your customers as individuals. Find out about their interests, culture, and background. Be personable and positive. Ask for feedback when appropriate. Shift to the professional level to accomplish the business of your conversations. Move between levels as often as you feel necessary. Be sure to end your conversations on the personal level. By doing so, you show your customers that you care about them as individuals and are committed to serving them.





**SCREEN NUMBER: 4**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: EXAMPLE**

*This example reinforces the content about building lasting relationships. A conversation is presented along with a personal/professional level chart. The chart is dynamically created to match the conversation flow (the line moves between levels along with the conversation).*

*\*Ideal for video in the future.*

**HOLE(S): GRAPHIC, AUDIO, PHOTO**

*Image 2 example at bottom of page.*

| IMAGE(S)   | AUDIO   | LINKS                   | DIRECTIONS                             |
|--|---|-------------------------|--|
| Image 1 = Photo of conversation between CSR1 and DMP1.<br><br>Image 2 = Dynamic graphic of chart shown below. Jagged line drawn automatically. | Audio 1 = Conversation between CSR1 and DMP1. CSR1 enters the conversation at the professional level, moves between professional and personal levels, and exits the conversation at the professional level. | Image 1 = play Audio 1. | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

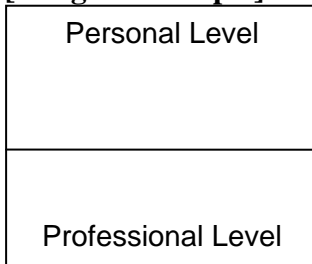
**[Text Field 1]**

Listen to the following conversation. Watch the chart to see how the customer service representative moves between the personal and professional levels of the conversation.

**[Text Field 2: After conversation plays, this text appears]**

Did you notice how the customer service representative started and ended the call on the professional level? What could s/he have done better?

**[Image 2 Example]**



**SCREEN NUMBER: 5**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: EXAMPLE**

*This example reinforces the content about building lasting relationships. A conversation is presented along with a personal/professional level chart. The chart is dynamically created to match the conversation flow (the line moves between levels along with the conversation).*

*\*Ideal for video in the future.*

**HOLE(S): GRAPHIC, AUDIO, PHOTO**

*Image 2 example at bottom of page.*

| IMAGE(S)   | AUDIO   | LINKS                   | DIRECTIONS                             |
|--|---|-------------------------|--|
| Image 1 = Photo of conversation between CSR1 and DMP1.<br><br>Image 2=Dynamic graphic of chart shown below. Jagged line drawn automatically. | Audio 1 = Conversation between CSR1 and DMP1. CSR1 enters the conversation at the personal level, moves between personal and professional levels, and exits the conversation at the personal level. | Image 1 = play Audio 1. | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

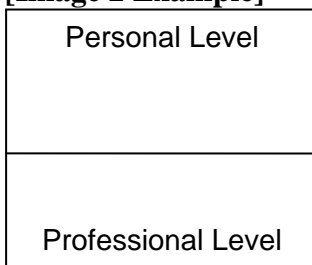
**[Text Field 1]**

Listen to the following conversation. Watch the chart to see how the customer service representative moves between the personal and professional levels of the conversation.

**[Text Field 2: After conversation plays, this text appears]**

Notice how well the conversation flowed as the customer service representative entered and exited the conversation on the personal level. Try to do the same in your conversations with customers.

**[Image 2 Example]**



**SCREEN NUMBER: 6**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This activity reinforces the content about building lasting relationships. It is similar to the previous two examples. A conversation is presented along with a personal/professional level chart. The user must create the chart to match the conversation flow by clicking in the appropriate section for the level presented. A line may or may not appear.*

**HOLE(S): GRAPHICS, AUDIO, PHOTO**

*Image 2 example on page 8.*

| IMAGE(S)   | AUDIO   | LINKS   | DIRECTIONS   |
|--|---|---|--|
| Image 1 = Photo of conversation between CSR1 and DMP1.<br><br>Image 2 = Dynamic graphic of chart on page 8. Includes “clickable” areas.<br><br>Image 3 = Graphic of Activity Icon. | Audio 1 = Conversation between CSR1 and DMP1. CSR1 enters the conversation at the personal level, moves between personal and professional levels, and exits the conversation at the personal level. | Image 1 = play Audio 1.<br><br>Submit = show Feedback text. | Click on a picture to hear an example.<br><br>Click on the personal or professional levels depending on the flow of the conversation.<br><br>Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

Listen to the following conversation and decide how the customer service representative moves between personal and professional levels. Click on the appropriate level in the graphic throughout the conversation to map how the customer service representative moves between personal and professional levels.

**[Feedback]**

Option 1: Incorrect. The customer service representative entered and exited the conversation on the personal level. S/he moved to the professional level [x] times.

Option 2: Correct!

**[Image 2 Example]**

|  |
|--|
| Personal Level<br><br>(Clickable area 1)     |
| (Clickable area 2)<br><br>Professional Level |

**SCREEN NUMBER: 7**

**TEMPLATE TYPE: CS-5A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen presents content about appropriate behaviors that Deseret Mutual Customer Service Representatives need to exhibit. A table and two audio examples show overall good and bad behaviors. Photos of Deseret Mutual Employees accompany content.*

*\*Ideal for video in the future.*

**HOLE(S): AUDIO, PHOTOS**

| IMAGE(S)   | AUDIO   | LINKS                   | DIRECTIONS                             |
|--|---|-------------------------|--|
| Image 1 = Photo of CSR1 on telephone demonstrating good behaviors. | Audio 1 = CSR1 phone conversation. Shows good behaviors.          | Image 1 = play Audio 1. | Click on a picture to hear an example. |
| Image 2 = Photo of CSR2 on telephone demonstrating bad behaviors.  | Audio 2 = CSR2 phone conversation with DMP2. Shows bad behaviors. | Image 2 = play Audio 2. |  |

**CONTENT (APPEARS ON SCREEN):**

**Behaviors that Strengthen Relationships**

Your behaviors affect your relationships with customers and ultimately their image of Deseret Mutual. Your customers are more likely to maintain lasting relationships and create a positive image of Deseret Mutual as you exhibit good behaviors. Look at the following list to see some behaviors you can strive to develop and avoid.

**Good Behaviors**

- Make recommendations
- Show appreciation
- Anticipate problems
- Use easily understood language
- Accept responsibility
- Plan the future

**Bad Behaviors**

- Make justifications
- Wait for misunderstandings
- Respond only to problems
- Use jargon
- Shift blame
- Rehash the past

Also, listen to positive and negative examples of behaviors that influence relationships with customers.

[Reference at bottom of screen]

(Table taken from Cottle, *Client-Centered Service*, 1990)

**SCREEN NUMBER: 8**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This activity reinforces the content about behaviors. A conversation is presented and the user must choose the behaviors exhibited. (Bad behaviors)*

*\*Ideal for video in the future.*

**HOLE(S): GRAPHIC, AUDIO, PHOTO**

*Image and Audio can be similar to Image 2 and Audio 2 on screen 7.*

| IMAGE(S)  | AUDIO   | LINKS   | DIRECTIONS  |
|---|---|---|---|
| Image 1 = Photo of CSR1 on telephone demonstrating bad behaviors.<br><br>Image 2 = Graphic of Activity Icon | Audio 1 = CSR1 phone conversation with DMP1. Shows bad behaviors. | Image 1 = play Audio 1.<br><br>Submit = show feedback text. | Click on a picture to hear an example.<br><br>Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Check Box]**

What bad behaviors did the customer service representative demonstrate? Select all that apply.

- Make justifications
- Wait for misunderstandings
- Respond only to problems
- Use jargon
- Shift blame
- Rehash the past

**[Feedback]**

Option 1: Incorrect. The customer service representative did / didn't [x,y,z (behaviors)].

Option 2: Almost! The customer service representative [x,y,z (behaviors)]. However, did you notice that s/he failed to [d,e,f, (behaviors)]?

Option 3: Correct! The customer service representative [x,y,z (behaviors)].

**SCREEN NUMBER: 9**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This activity reinforces the content about behaviors. A conversation is presented and the user must choose the behaviors exhibited. (Good behaviors)*

*\*Ideal for video in the future.*

**HOLE(S): GRAPHIC, AUDIO, PHOTO**

*Image and Audio can be similar to Image 1 and Audio 1 on screen 7.*

| IMAGE(S)   | AUDIO  | LINKS   | DIRECTIONS  |
|--|--|---|---|
| Image 1 = Photo of CSR1 on telephone demonstrating good behaviors.<br><br>Image 2 = Graphic of Activity Icon | Audio 1 = CSR1 phone conversation with DMP1. Shows good behaviors. | Image 1 = play Audio 1.<br><br>Submit = show feedback text. | Click on a picture to hear an example.<br><br>Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Check Box]**

What good behaviors did the customer service representative demonstrate? Select all that apply.

- Make recommendations
- Show appreciation
- Anticipate problems
- Use easily understood language
- Accept responsibility
- Plan the future

**[Feedback]**

Option 1: Incorrect. The customer service representative did / didn't [x,y,z (behaviors)].

Option 2: Almost! The customer service representative [x,y,z (behaviors)]. However, did you notice that s/he also [d,e,f, (behaviors)]?

Option 3: Correct! The customer service representative [x,y,z (behaviors)].

**SCREEN NUMBER: 10**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: EXAMPLE**

*This screen presents success stories from Deseret Mutual Customer Service Representatives pertaining to building relationships. Clicking on graphics of people will play audio.*

**HOLE(S): AUDIO, PHOTO**

*CSRs discuss successes of building relationships with customers.*

| IMAGE(S)                 | AUDIO  | LINKS                   | DIRECTIONS                             |
|--------------------------|--|-------------------------|--|
| Image 1 = Photo of CSR1. | Audio 1 = Success story of building relationships from CSR1. | Image 1 = play Audio 1. | Click on a picture to hear an example. |
| Image 2 = Photo of CSR2. | Audio 2 = Success story of building relationships from CSR2. | Image 2 = play Audio 2. |  |

**CONTENT (APPEARS ON SCREEN):**

**[Text Field 1]**

Listen to [name of CSR1]'s story about building relationships.

**[Text Field 2]**

Listen to [name of CSR2]'s story about building relationships.



---

**SCREEN NUMBER: 11**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen presents unit review text.*

**HOLE(S): GRAPHIC**

| IMAGE(S)                                | AUDIO | LINKS           | DIRECTIONS           |
|---|-------|-----------------|----------------------|
| Image 1 = Graphic of big red checkmark. | None  | → = Splash Page | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Review**

Your customers will have a positive opinion of Deseret Mutual as you build lasting, individual relationships with them. They will be more likely to keep their business with Deseret Mutual because of your friendship with them. Remember to:

- Have a personal and professional relationship with your customers by communicating on the personal and professional levels
  - Begin your conversation on the personal level
  - Move between levels as appropriate
  - End your conversation on the personal level
- Strengthen relationships by acquiring and maintaining positive behaviors
  - Make recommendations
  - Show appreciation
  - Anticipate problems
  - Use easily understood language
  - Accept responsibility
  - Plan the future

**Sample instructor-led activities:**

1. Practice building relationships by getting to know your team members or others in your organization.
2. In groups of 3, practice speaking at the personal/professional level. One person should act as the customer, another as the customer service representative, and the third as a neutral observer. Have the observer map the conversation by diagramming when the customer service representative speaks at the personal and professional levels. Allow time for group discussion. Rotate roles through each individual.

---

**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about why problem solving is important to Deseret Mutual. On screen is a graphic of our Deseret Mutual Customer Service Representative “Dan” who narrates the content when the page is opened.*

**HOLE(S): AUDIO, PHOTO**

| <b>IMAGE(S)</b>        | <b>AUDIO</b>                              | <b>LINKS</b>                  | <b>DIRECTIONS</b>    |
|------------------------|---|-------------------------------|----------------------|
| Image 1 = Photo of Dan | Audio 1 = Narration of on-screen content. | Customers = Unit 2, Screen 1. | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Problem Solving**

Problem solving is essential to maintaining quality customer service. If we can't help resolve our customers' problems, then we're not really doing our jobs. Problem solving involves identifying the problem, identifying and selecting the best solution for the problem, and following up to make sure that our customers' needs are met.

Because identifying problems is perhaps the most difficult of the three processes, this unit will emphasize ways to help you effectively identify your customers' problems. You will also learn how to identify and select solutions to problems and follow up with your customers.

**SCREEN NUMBER: 2**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen provides content for identifying the problem. Sidebar text acts as a summary.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS   | DIRECTIONS           |
|----------|-------|---|----------------------|
| None     | None  | Building Relationships = Unit 4, Screen 1.<br><br>A.C.E. Employees = Unit 3, Screen 1.<br><br>Effective Listening = Unit 6, Screen 1. | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Identify the Problem**

*Connect with your customers*

The first step in identifying the problem is connecting with your customers. In order to connect with your customers, you need to have a good relationship with them. For more information on how to do that, please refer to [Building Relationships](#).

*Listen and ask questions*

Usually, your customers will be able to tell you what their problems are, but in some instances you will have to discover the problem yourself. To do this, try to ask simple, direct, open-ended questions that require more than a “yes” or “no” response. Ask questions that promote a discussion. Maintain an equal relationship with your customers and avoid being manipulative.

Make sure you give your customers adequate time to respond. Give them your full attention while listening and show empathy when appropriate. Ask additional, clarifying questions and restate their responses as needed. (See [Customers](#) for tips on handling angry customers, [A.C.E Employees](#) for tips on showing empathy, and [Effective Listening](#) for effective listening techniques).

*Define the problem*

Your goal when you are identifying the problem should be to define the problem in a clear and concise manner. If you can clearly define the problem, you will be able to select appropriate solutions to the problem and make proper decisions about courses of action.

**Unit 4: Problem Solving**

Part of defining the problem is understanding what your customers are really saying. You need to be able to interpret your customers' words and body language to understand their true feelings.

**[Sidebar]**

Identify the problem by:

- Connecting with your customers
- Listening and asking questions
- Defining the problem

**SCREEN NUMBER: 3**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: EXAMPLE**

*This example shows the user how to identify problems of various customers. An audio example accompanied by a photo presents a customer's problem or complaint. The example is analyzed by the customer service representative and the customer's real problem is discovered and shown to the user after the audio plays. The problem should be real to Deseret Mutual Customer Service Representatives; one that they have previously encountered.*

*\*Ideal for video in the future.*

**HOLE(S): AUDIO, PHOTO, CONTENT**

*Audio should demonstrate the three steps of problem identification shown below. It should include a conversation between CSR1 and DMP1 and CSR1's thought processes. The picture could be a CSR talking on the phone or conversing with DMP1 face-to-face. Content should be updated according to the nature of the problem.*

| IMAGE(S)  | AUDIO  | LINKS                  | DIRECTIONS                             |
|---|--|------------------------|--|
| Image 1 = Photo of CSR1 conversing via phone or face-to-face with DMP1. | Audio 1 = Conversation between CSR1 and DMP1 about DMP1's problem (true to life at Deseret Mutual) | Image 1 = play Audio 1 | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

Listen to the following example. Notice how the customer service representative identifies the problem by:

- Connecting with the customer
- Listening and asking questions
- Defining the problem

**[This text appears after audio plays.]**

In this example, the customer service representative connected with the customer by establishing a strong relationship, listening and asking clarifying, open-ended questions, and correctly defining the problem to be [x].

**SCREEN NUMBER: 4**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This activity helps the user identify problems of various customers. The user is presented with a problem and must interpret its true meaning.*

*\*Ideal for video in the future.*

**HOLE(S): GRAPHIC, AUDIO, PHOTO, CONTENT**

*Since this activity is similar to the preceding example, the photo from screen 3 can be used here. The audio example should be similar to Audio 1 on screen 3, but demonstrate a different problem. Content for the options and feedback shown below should be updated according to the nature of the problem.*

| IMAGE(S)  | AUDIO  | LINKS   | DIRECTIONS  |
|---|--|---|---|
| Image 1 = Photo of CSR1 conversing via phone or face-to-face with DMP1.<br><br>Image 2 = Graphic of Activity Icon | Audio 1 = Conversation between CSR1 and DMP1 about DMP1's problem (true to life at Deseret Mutual) | Image 1 = play Audio 1.<br><br>Submit = show Feedback text. | Click on a picture to hear an example.<br><br>Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Check Box]**

Click on a picture to listen to the conversation and see if you can correctly identify the problem.

- [correct option]
- [incorrect option]
- [incorrect option]
- [incorrect option]

**[Feedback]**

Option 1: Incorrect. The customer's real problem was [correct option].

Option 2: Correct! The real problem was [correct option].

**SCREEN NUMBER: 5**

**TEMPLATE TYPE: CS-5A**

**FUNCTIONALITY: CONTENT**

*This screen discusses how to identify and select the best solution for customers' problems.*

**HOLE(S): PHOTOS, CONTENT**

*Images illustrate different sources of solutions (e.g., policy manual, supervisor, another employee, etc.). Content about sources of solutions to problems and questions to consider is needed from Deseret Mutual.*

| IMAGE(S)                          | AUDIO | LINKS | DIRECTIONS           |
|-----------------------------------|-------|-------|----------------------|
| Image 1 = Photo of policy manual. | None  | None  | Click → to continue. |
| Image 2 = Photo of supervisor.    |       |       |                      |

**CONTENT (APPEARS ON SCREEN):**

**Identify and select the best solution**

Once you understand your customers' problems and needs, it is your task to identify all possible solutions or courses of action to take in order to remedy the problems. You may need to refer to your policy manual, supervisor, or another employee for all possible solutions **[need Deseret Mutual input]**. It might be useful to make a list of solutions to choose from.

After identifying all possible solutions to your customers' problems, evaluate each solution for its worth. In general, choose the best solution to meet your customers' individual needs while complying with Deseret Mutual standards. You may want to bear in mind some of the following criteria when selecting a solution **[need Deseret Mutual input]**:

- What are the potential risks and benefits of this solution?
- Is this solution consistent with Deseret Mutual policies?
- Is this the fastest solution?
- Is this the cheapest solution?
- Is this solution best for the long term or is this solution just a quick fix?
- What do I sacrifice by choosing a short-term solution over a long-term solution?
- Who else does this solution impact? How does it impact them?
- If I make this solution available to one customer, will I have to make it available to all customers?



---

**SCREEN NUMBER: 6**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This screen requires users to select criteria that are pertinent to their jobs. Generic feedback is given.*

**HOLE(S): GRAPHIC, CONTENT**

*Deseret Mutual input needed about criteria listed below.*

| IMAGE(S)                           | AUDIO | LINKS                        | DIRECTIONS                  |
|------------------------------------|-------|------------------------------|-----------------------------|
| Image 1 = Graphic of Activity Icon | None  | Submit = show Feedback text. | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Check Box]**

Think for a minute about the following criteria **[need Deseret Mutual input]**. Which have the most significance to you as a Deseret Mutual Customer Service Representative? Select all that apply.

- What are the potential risks and benefits of this solution?
- Is this solution consistent with Deseret Mutual policies?
- Is this the fastest solution?
- Is this the cheapest solution?
- Is this solution best for the long term or is this solution just a quick fix?
- What do I sacrifice by choosing a short-term solution over a long-term solution?
- Who else does this solution impact? How does it impact them?
- If I make this solution available to one customer, will I have to make it available to all customers?

**[Feedback]**

Thank you! Those are important criteria to remember when selecting solutions to your customers' problems.

**SCREEN NUMBER: 7**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This activity requires the customer service representative to analyze how a customer service representative identified and selected the best solution for the customer's problem.*

*\*Ideal for video in the future.*

**HOLE(S): GRAPHIC, AUDIO, PHOTO**

| IMAGE(S)   | AUDIO  | LINKS   | DIRECTIONS  |
|--|--|---|---|
| Image 1 = Photo of CSR1 selecting solution to problem from policy manual.<br><br>Image 2 = Graphic of Activity Icon. | Audio 1 = Story from CSR1 about selecting solutions. Include the steps followed and solution arrived at. | Image 1 = play Audio 1.<br><br>Submit = show Feedback text. | Click on a picture to hear an example.<br><br>Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Check Box]**

Click on the picture to listen to the example and consider how the customer service representative identified and selected the best solution for the customer's problem. As you listen, select all of the criteria the customer service representative considered.

- What are the potential risks and benefits of this solution?
- Is this solution consistent with Deseret Mutual policies?
- Is this the fastest solution?
- Is this the cheapest solution?
- Is this solution best for the long term or is this solution just a quick fix?
- What do I sacrifice by choosing a short-term solution over a long-term solution?
- Who else does this solution impact? How does it impact them?
- If I make this solution available to one customer, will I have to make it available to all customers?

**[Feedback]**

Option 1: Incorrect. The customer service representative also considered/failed to consider [xyz].

Option 2: Correct!

---

**SCREEN NUMBER: 8**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen discusses how to follow up with customers. Audio and graphic provide an example of the content.*

**HOLE(S): AUDIO, PHOTO, CONTENT**

*Content about Deseret Mutual's policies of following up needed.*

| IMAGE(S)                          | AUDIO  | LINKS                   | DIRECTIONS                             |
|-----------------------------------|--|-------------------------|--|
| Image 1 = Photo of CSR1 on phone. | Audio 1 = CSR1 discusses how s/he follows up | Image 1 = play Audio 1. | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

**Follow up [Content needed from Deseret Mutual]**

Following up is one way that you can help Deseret Mutual be the best benefits provider on earth. It shows your customers that you care and promotes a positive company image. When possible, follow up with your customers to see if the solutions you suggested solved their problems. Try to follow up within a few days of your conversation. There are many ways you can follow up with your customers. Give them a call or send them a letter. Make sure to be personable and strengthen your relationship with them. Take ownership for your customers' problems by discovering how your solution is meeting their needs. Remember to add your comments to the customers' files in the system.

Click on the picture to listen to the example about following up.

---

**SCREEN NUMBER: 9**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*Summary of content presented in this unit.*

**HOLE(S): GRAPHIC**

| IMAGE(S)                                | AUDIO | LINKS            | DIRECTIONS           |
|---|-------|------------------|----------------------|
| Image 1 = Graphic of big red checkmark. | None  | → = Splash Page. | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Review**

Problem solving a necessary component in high-quality customer service. Remember the following processes as you work with customers to solve their problems:

- Identify the problem
  - Connect with your customers
  - Listen and ask questions
  - Define the problem
- Identify all possible solutions
- Select the best solution for the customer
- Follow up

**Unit 4: Problem Solving**

**Sample Instructor Led Activities:**

1. In groups of two, practice identifying predetermined problems by connecting with your partner, listening and asking questions, and defining the problem.
2. Identify all possible solutions to particular problems as a group. Make a list of solutions for future reference.
3. Practice inviting your partner to do something like read a book, then plan to follow up about his or her experience. Actually follow up after a short time period.

---

**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about what listening should mean to a Deseret Mutual Customer Service Representative. On screen is a graphic of our Deseret Mutual Customer Service Representative “Dan” who narrates the content when the page is opened.*

**HOLE(S): AUDIO, PHOTO**

| IMAGE(S)               | AUDIO                                     | LINKS | DIRECTIONS           |
|------------------------|---|-------|----------------------|
| Image 1 = Photo of Dan | Audio 1 = Narration of on-screen content. | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Why talk about listening?**

We are always listening! As Deseret Mutual Customer Service Representatives, listening is our opportunity to show customers that we care. Before we can solve their problems or provide answers to their questions, we must listen to identify what we can and need to do. Often, we can't fix everything for a customer, but we can always listen and let them know that at Deseret Mutual we're here, and we care. This helps customers build a relationship with Deseret Mutual that will continue and grow for many years to come.

During this unit you will look at how to build your listening skills through practice and how to avoid common listening problems. Before you dive into the specific content, think a little more about why listening is important to you.

---

**SCREEN NUMBER: 2**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: EXAMPLE**

*This screen gives users an example/scenario of listening in their lives.*

**HOLE(S): PHOTO, EXAMPLE**

*The generic example listed below should be revised with Deseret Mutual content.*

| IMAGE(S)  | AUDIO | LINKS | DIRECTIONS           |
|---|-------|-------|----------------------|
| Image 1 = Photo relevant to example (in this case, car running over video camera) | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Why is listening important to you?**

Having someone listen to you is important. Consider the following example.

You accidentally ran over your new 400\$ video camera and destroyed it. How would you feel? Would you tell someone about how frustrated that made you feel? Perhaps you would call your friend, your spouse, or the warranty company. In all of these situations it is important to tell someone your story, to feel heard, and to know someone listens and cares even if they can't change or fix anything.

Have you had calls like this as a customer service representative? Can you think about a recent experience where you needed a customer service representative to listen to you?

---

**SCREEN NUMBER: 3**

**TEMPLATE TYPE: 4A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This is a screen with information presentation and a photo with a comment from a Deseret Mutual Customer Service Representative*

**HOLE(S): PHOTO, EXAMPLE**

*Photo can be any CSR that has had an experience like the one described in the sidebar text.*

| IMAGE(S)                 | AUDIO | LINKS | DIRECTIONS           |
|--------------------------|-------|-------|----------------------|
| Image 1 = Photo of CSR1. | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Purposes of Listening**

As a Deseret Mutual Customer Service Representative, you listen to be able to provide good customer service. Listening helps you:

- Show customers you care
- Show customers you are willing to help them
- Allow customers to speak and be heard
- Find out what the real problem is
- Understand your customers' needs

[**Sidebar:** Include a quote with a picture from a customer service representative saying a positive experience they have had listening to a customer or why they feel it is important to listen to a customer]



**SCREEN NUMBER: 4**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: EXAMPLE**

*Good/Bad examples of listening skills from Deseret Mutual's training team presented as audio clips with photos.*

*\*Ideal for video in future.*

**HOLE(S): AUDIO, PHOTO, EXAMPLE, CONTENT**

*Text on screen represents Deseret Mutual examples of poor and effective listening.*

| IMAGE(S)  | AUDIO   | LINKS  | DIRECTIONS                             |
|---|---|--|--|
| Image 1 = Photo of CSR1 at desk, on phone; very relaxed; daydreaming (bad example).<br><br>Image 2 = Photo of CSR2 at desk, on phone; focused on work (good example). | Audio 1 = (Bad example) Phone call between CSR1 and DMP1. CSR1 is distracted, has no energy, judges, finishes sentences, etc.<br><br>Audio 2 = (Good example) Phone call between CSR2 and DMP2. CSR2 effectively listens (opposite of Audio 1). | Image 1 = play Audio 1.<br><br>Image 2 = play Audio 2. | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

Take a few moments to go through these examples of listening. Click on a picture to hear an example.

**[Text Field 1. Need Deseret Mutual input]**

Summary of bad example; to be determined based on example.

**[Text box 2. Need Deseret Mutual input]**

Summary of good example; to be determined based on example.

**SCREEN NUMBER: 5**

**TEMPLATE TYPE: CS-3A**

**SCREEN TITLE: LISTENING SKILLS OVERVIEW**

*This screen identifies critical listening skills. The customer service representative can work through any skill in any order, which at the completion will bring them back to this screen where they can choose another skill*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS  | DIRECTIONS                            |
|----------|-------|--|---------------------------------------|
| None     | None  | Listen for central ideas = screen 5A<br><br>Give the customer your total attention = 5B<br><br>Be actively involved = 5C<br><br>Maintain a neutral, open mind = 5D<br><br>Clarify the message = 5E<br><br>→ = Screen 6 | Click on a <u>Link</u> to learn more. |

**CONTENT (APPEARS ON SCREEN):**

**Critical Listening Skills**

The previous examples focused on why listening is important to providing good customer service at Deseret Mutual. Now look at these specific skills to help you become an effective listener.

- [Listen for central ideas.](#)
- [Give the customer your total attention](#)
- [Be actively involved](#)
- [Maintain a neutral, open mind](#)
- [Clarify the message](#)

---

**SCREEN NUMBER: 5A**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen deals with the topic of listening for central ideas. Clicking → returns the user to Screen 5.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 5 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Listen for Central Ideas**

As you listen, concentrate on facts and feelings to understand your customers' main message. You need to understand what your customers say and how they say it. Simply focusing on facts often leads to misinterpretation. How your customers speak (verbally and physically) is just as important as what they say. But don't get hung up on your customers' manner of speaking. Focus on understanding the core issues.

**[Sidebar]**

Listen for central ideas:

- Concentrate on facts and feelings
- Pay attention to how your customers speak
- Focus on the core issues

---

**SCREEN NUMBER: 5B**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen deals with the topic of giving the customer your total attention. Clicking → returns the user to Screen 5.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 5 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Give the Customer Your Total Attention**

Listening effectively is a challenging mental task. Nothing bothers customers more than when they think you are not paying attention. Don't be distracted by other responsibilities, people, or background noise. It is often easy to get distracted because you can think much faster than a person can talk. Use this extra time to your advantage. Mentally summarize or develop a picture of what your customers are saying. Take notes to remain focused. Analyze the message so you can respond appropriately.

**[Sidebar]**

Give your total attention:

- Don't be distracted
- Summarize the conversation
- Analyze the message

---

**SCREEN NUMBER: 5C**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen deals with the topic of being actively involved in listening. Clicking → returns the user to Screen 5.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 5 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Be Actively Involved**

It is important to interact with your customers to show them that you are listening and respect what they have to say. Demonstrate this skill by echoing words or paraphrasing. You might try commenting something like “That’s interesting. Tell me more” or “um hmm...” to affirm that you understand the conversation. If you don’t understand, ask for more information or clarification.

If you meet with your customers in person, use your body language to demonstrate that your involvement. Try to maintain eye contact with your customers, nod your head, lean in closer, and show concern or smile when appropriate.

**[Sidebar]**

Be actively involved:

- Echo or paraphrase
- Ask for clarification
- Use body language when possible

---

**SCREEN NUMBER: 5D**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen deals with the topic of maintaining a neutral, open mind. Clicking → returns the user to Screen 5.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 5 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Maintain a Neutral, Open Mind**

When you are too emotionally involved in listening or not involved at all, you tend to hear what you want to hear rather than what is actually being said. Your mood influences your perception of a conversation. Try to remain objective and open-minded. Part of keeping an open mind involves waiting until your customers are finished talking before drawing conclusions. Don't form an opinion prematurely or make predictions before they've finished talking. Also, don't judge your customers on their physical appearance or manner of speaking.

**[Sidebar]**

Maintain an open mind:

- Remain objective
- Allow the customer to finish
- Don't judge

---

**SCREEN NUMBER: 5E**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen deals with listening for clarifying the message. Clicking → returns the user to Screen 5.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 5 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Clarify the Message**

Asking for clarification is a good way to demonstrate to your customers that you are engaged in the conversation, as shown earlier. Don't interrupt your customers to ask for clarification. Wait for pauses or breaks in their dialogue. Restating is another way to clarify or show understanding. When your customers have finished talking, restate what they said in your own words. Then ask your customers if what you said is correct. Restating shows the customers that you were actively listening and that you understand the central idea of the conversation.

**[Sidebar]**

Clarify the message:

- Wait for pauses or breaks
- Restate
- Ask questions

**SCREEN NUMBER: 6**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*The activity reinforces the content given in the previous screens (Screens 5-5e). The graphic is linked with an audio example of a phone call received by a customer service representative. The checkbox on the right is a listing of skills that the customer service representative might have displayed throughout the course of the conversation. The user will select those skills that were exhibited and click on the submit button. The user will receive feedback on his/her selections in the textbox at the bottom of the screen.*

*\*Ideal for video in the future.*

**HOLE(S): GRAPHIC, AUDIO, PHOTO**

*CSR1 demonstrates one of the skills listed below in the conversation.*

| IMAGE(S)  | AUDIO   | LINKS                        | DIRECTIONS  |
|---|---|------------------------------|---|
| Image 1 = CSR1 on phone.<br><br>Image 2 = Graphic of Activity Icon. | Audio 1 = Conversation between CSR1 and DMP1. | Submit = Show feedback text. | Click on a picture to hear an example.<br><br>Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Check Box]**

Which of the following skills did the customer service representative demonstrate effectively? Check all that apply.

- Listen for central ideas.
- Give the customer your total attention
- Be actively involved
- Maintain a neutral, open mind
- Clarify the message

**[Feedback]**

Option 1: Incorrect. The customer service representative also did/didn't do [x,y,z].

Option 2: Correct! The customer service representative addressed the customer's needs by [x,y,z].

However, did you notice that s/he failed to [d,e,f]?

Option 3: Correct! The customer service representative addressed the customer's needs by [x,y,z].



**SCREEN NUMBER: 7**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*The activity reinforces the content given in the previous screens (Screens 5-5e). The graphic is linked with an audio example of a phone call received by a customer service representative. The checkbox on the right is a listing of skills that the customer service representative might have displayed throughout the course of the conversation. The user will select those skills that were exhibited and click on the submit button. The user will receive feedback on his/her selections in the textbox at the bottom of the screen.*

*\*Ideal for video in the future.*

**HOLE(S): GRAPHIC, AUDIO, PHOTO**

*CSR1 demonstrates all of the skills listed below in the conversation.*

| IMAGE(S)  | AUDIO   | LINKS                        | DIRECTIONS  |
|---|---|------------------------------|---|
| Image 1 = CSR1 on phone.<br><br>Image 2 = Graphic of Activity Icon. | Audio 1 = Conversation between CSR1 and DMP1. | Submit = Show feedback text. | Click on a picture to hear an example.<br><br>Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Check Box]**

Try another example. Which of the following skills did the customer service representative demonstrate effectively? Check all that apply.

- Listen for central ideas.
- Give the customer your total attention
- Be actively involved
- Maintain a neutral, open mind
- Clarify the message

**[Feedback]**

Option 1: Incorrect. The customer service representative also did/didn't do [x,y,z].

Option 2: Correct! The customer service representative addressed the customer's needs by [x,y,z].

However, did you notice that s/he failed to [d,e,f]?

Option 3: Correct! The customer service representative addressed the customer's needs by [x,y,z].

---

**SCREEN NUMBER: 8**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen presents unit summary text.*

**HOLE(S): GRAPHIC**

| IMAGE(S)                               | AUDIO | LINKS           | DIRECTIONS           |
|--|-------|-----------------|----------------------|
| Image 1 = Graphic of big red checkmark | None  | → = Splash Page | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Review**

Listening is an important skill to be developed in order to help our customers feel appreciated. Remember the following dos and don'ts of effective listening:

Do:

- Listen for central ideas by:
  - Concentrating on facts and feelings
  - Looking for physical and verbal cues
  - Understanding core issues
- Give the customer your total attention by:
  - Taking notes
  - Mentally summarizing or developing a picture
  - Analyzing
- Be actively involved by:
  - Echoing, commenting, and asking questions
  - Showing physical signs of involvement
- Maintain a neutral, open mind by:
  - Being objective
  - Allowing the customer to speak
- Clarify the message by:
  - Asking questions during pauses
  - Restating key points

Don't:

- Focus on facts alone
- Get hung up on delivery errors
- Be distracted
- Be passively involved
- Be too emotionally involved
- Judge prematurely
- Interrupt

**Sample Instructor Led Activities:**

1. Play “Gossip.” Tell a story to one person and have them tell it to another until everyone in the group has heard it “down the line.”
2. Practice the five “dos” mentioned in this unit in small groups. Have each member relate a personal experience. Make sure the others in the group take notes, restate, etc.

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**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about what communication is and why it is important. It also provides an overview of the rest of unit. We show a graphic of our Deseret Mutual employee “Dan”. The graphic is accompanied by an audio file that narrates the content when the page is opened.*

**HOLE(S): PHOTO, AUDIO**

*Need a photo of Dan, as well as an audio file to accompany the photo.*

| IMAGE(S)              | AUDIO                                   | LINKS                | DIRECTIONS           |
|-----------------------|---|----------------------|----------------------|
| Image 1= Photo of Dan | Audio 1= Narration of on-screen content | Image 1=play Audio 1 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

At Deseret Mutual, effective communication is an important part of our customer service. The ability to communicate our thoughts and actions back to our customer is just as critical as hearing and understanding our customers. Communicating effectively lets our customers know we are listening. When we communicate effectively, we help our customers understand what steps we are taking to resolve their problems and concerns.

Communication is composed of words, tone of voice, gestures and body language. These are typically divided into 2 methods of communication: verbal and non-verbal. As you go through this unit, you'll see how you can use each of these methods to effectively communicate with your customers.

**SCREEN NUMBER: 2**

**TEMPLATE TYPE: CS-3A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This introduces the concept of verbal communication. Common communication barriers are identified.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS   | DIRECTIONS           |
|----------|-------|---|----------------------|
| None     | None  | Attitude, Empathy and Confidence = Unit 3, Screen 1 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Verbal Communication**

Verbal communication consists of the words you use to communicate, and your tone of voice. What you say to your customers and how you say it is very important. Let's focus first on the words you use.

**Words you use**

If you want to effectively communicate with your customers, you must be able to say what you mean. Have you ever had a conversation with a customer where they didn't understand the message you were trying to convey? When something like this happens, it is called a communication breakdown. Reasons for these breakdowns include:

- **You** are nervous or lack confidence
- **You** are not clear and concise when communicating with customers
- The **customer** isn't listening
- The **customer's perception** of the situation causes them to interpret what you are saying differently

Notice that some reasons for communication breakdowns are within your control. There are things you can change that will help remove some of those breakdowns. You can't alter what the customer is doing, but you can alter how you present yourself and the words you use in communicating. In order to learn how to gain confidence, review [Attitude, Confidence and Empathy](#). Here, we'll focus on helping you make your communication clear and concise.

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## SCREEN NUMBER: 3

TEMPLATE TYPE: 4A/8A

FUNCTIONALITY: CONTENT

*This screen introduces the topic of clear and concise communication. It outlines several practices to avoid. Each practice listed is actually a link to another page, which explains that practice in detail and provides the participant with examples.*

### HOLE(S): GRAPHIC

*Need a graphic that contains the words: Filler Words, Jargon, Negative Words and Exaggeration*

| IMAGE(S)  | AUDIO | LINKS  | DIRECTIONS                                     |
|---|-------|--|--|
| Image 1= Graphic containing the types of words (filler, jargon, etc.), all mixed around | None  | Filler Words = Screen 3A<br>Jargon = Screen 3B<br>Negative Words = Screen 3C<br>Exaggeration = Screen 3D | Click on a <a href="#">Link</a> to learn more. |

### CONTENT (APPEARS ON SCREEN):

#### Clear and Concise Communication

You can make your communications with customers clear and concise by avoiding the use of certain types of words when communicating with your customer. Types of words include:

- [Filler Words](#)
- [Jargon](#)
- [Negative Words](#)
- [Exaggeration](#)

Click on the heading to get more detailed information about each type, and to see specific examples.

Remember that what you say is just as important as what you don't say. Don't try to "fill up space" with words that don't add any value to the conversation. Use words that your customer is familiar with and understands. Never talk down or use words that may have a negative effect on your customer. Inject energy into the conversation when appropriate, but don't overdo it.

---

**SCREEN NUMBER: 3A**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen explains what filler words are, and provides the user with examples of each. The examples are contained in the sidebar.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 3 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Filler Words**

Often, when you are nervous or unsure, you use “fillers,” or words that add no meaning, but take up space. You might use them even when you’re not nervous, because they have become a habit. Using these words dilutes the meaning of your message to the customer, and makes you appear less competent in your ability to help them. Look at the box on the left to see a list of words you want to avoid using when you speak with customers.

**[Sidebar]**

Filler Words:

- Er...
- Um...
- You know....
- Yeah....
- Well...
- Like....
- Kind of...
- Basically...
- Sort of...
- Actually...

---

**SCREEN NUMBER: 3B**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen explains what jargon is, and provides the user with examples of jargon used at Deseret Mutual. The examples are contained in the sidebar.*

**HOLE(S): CONTENT**

*Need a list of Deseret Mutual specific jargon to be included in the sidebar.*

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 3 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Jargon**

Do you remember when you first joined Deseret Mutual and your coworkers used a lot of acronyms that you didn't understand? That's exactly what happens when you use industry specific terms or acronyms (often called jargon) with your customers. Using jargon confuses your customer. It may make them upset because they think you're trying to talk down to them. Then they tune out and no longer listen to your message. Look at the box on the left for jargon associated with Deseret Mutual. Remember to avoid these terms when communicating with customers.

**[Sidebar]**

Jargon:

*Get from Deseret Mutual*



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**SCREEN NUMBER: 3C**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen explains what negative words are, and provides the user with examples. The examples are contained in the sidebar.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 3 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Negative Words**

You may unconsciously use words and phrases that have a negative or lowering effect. Use of these words causes the customer to feel defensive, put down and not appreciated. You may not even be aware that you are using these words, or that you are offending the customer. Take a moment to review some of the negative phrases in the side bar to the left. Can you think of any other words or phrases to avoid?

**[Sidebar]**

Negative Words:

- As you already know...
- With all due respect...
- We've never had complaints about that before...
- I'm sorry you are so upset about this...
- Well, most of our customers realize...
- So what you're trying to say is....
- Are you sure about this?
- I don't mean to be rude, but....

---

**SCREEN NUMBER: 3D**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen explains what kinds of words are associated with exaggeration, and provides the user with examples. The examples are contained in the sidebar.*

**HOLE(S): NONE**

| IMAGE(S) | AUDIO | LINKS        | DIRECTIONS           |
|----------|-------|--------------|----------------------|
| None     | None  | → = Screen 3 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Exaggeration**

Injecting energy and enthusiasm into your speech is fine, but be careful that you don't overdo it. Too much energy and excitement takes away from the sincerity of the conversation. You may unconsciously use many of these words as part of your everyday speech. Or you may get so involved with your customer that you don't notice how often you use these words. Look at the list on the left to see which of these words you use on a regular basis. These words can be appropriate at times, but make sure that you don't use too many of them at once.

**[Sidebar]**

Exaggeration:

- Terribly
- Brilliant
- Enormously
- Awfully
- Wonderful
- Gorgeous
- Fantastic
- Awesome
- Really
- Incredible
- Amazing
- Unbelievable

**SCREEN NUMBER: 4**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen shows the importance of tone when communicating with customers. Each identified tone is linked to an audio example of someone using that tone. The graphic represents the employee (the voice that is heard when clicking the audio links).*

**HOLE(S): PHOTO, AUDIO**

*Need a photo of CSR1, as well as audio files to accompany each link.*

| IMAGE(S)  | AUDIO   | LINKS  | DIRECTIONS                            |
|---|---|--|---------------------------------------|
| Image 1 = Photo of CSR1 to represent the audio voice you hear | Audio 1-7 = CSR1 saying "This is [name] how can I help you?" in each of the different tones | Tired = play Audio 1<br>Hurried = play Audio 2<br>Angry = play Audio 3<br>Relaxed = play Audio 4<br>Patronizing = play Audio 5<br>Sincere = play Audio 6<br>Condescending = play Audio 8 | Click on a <u>Link</u> to learn more. |

**CONTENT (APPEARS ON SCREEN):**

**Tone of Voice**

Beyond the words you use, the way you convey those words also affects your ability to communicate effectively with customers. The tone of your voice can have a large impact on how your customers respond. Think about your tone when addressing customers. Do you sound:

- [Tired](#)
- [Hurried](#)
- [Angry](#)
- [Relaxed](#)
- [Patronizing](#)
- [Sincere](#)
- [Condescending](#)

Select each tone to see how the same words can come across very differently. How do you come across when you use different tones?

**SCREEN NUMBER: 5**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen introduces the importance of communicating nonverbally. Graphics are used to show how nonverbal communications can impact our perception of what is being said.*

**HOLE(S): PHOTO**

*Need photos of customer service representatives using nonverbal means to communicate (good and bad examples).*

| IMAGE(S)   | AUDIO | LINKS | DIRECTIONS           |
|--|-------|-------|----------------------|
| Image 1 = Photo of slouching CSR1, arms folded, lowered head, looking tired, helping DMP1<br><br>Image 2= Photo of professionally dressed CSR2 smiling, making eye contact with DMP2 | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Nonverbal Communications**

Nonverbal messages are anything you do that detracts from or enhances what you say. Nonverbal communication is communication that you are least aware of, such as your facial expressions, your gestures and other body language as you interact with customers.

In general, non-verbal clues account for 55% of what you communicate to your customers. Words only account for 7% and your tone of voice for 38%; as a result, it is important to be aware of the nonverbal messages you send and how these messages affect your customers' perceptions of you.

Look at these photos of customer service representatives at work. What are they communicating to you?

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**SCREEN NUMBER: 6**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen presents positive, nonverbal communication techniques that can impact a customer's perception of an individual. A photo of an employee interacting with a customer provides a visual example of how this is done.*

**HOLE(S): PHOTO**

*Need a photo of a customer service representative using nonverbal means to communicate (good example). This can be the same as Image 2 on the previous screen.*

| IMAGE(S)  | AUDIO | LINKS | DIRECTIONS           |
|---|-------|-------|----------------------|
| Image 1 = Photo of CSR1 interacting in a positive way with the DMP1 | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Nonverbal Communication Techniques**

Whenever you have a face-to-face interaction with a customer, remember to:

- Stand up straight (no slouching)
- Make eye contact
- Sit in an inviting manner (no folded arms)
- Smile
- Have energy
- Dress professionally
- Shake hands firmly

These actions have a positive effect on your customers. They increase their confidence in you and in your abilities to help solve their problems.

**SCREEN NUMBER: 7**

**TEMPLATE TYPE: CS-5A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen focuses on the importance of nonverbal communication using the telephone. It also provides good and bad examples of nonverbal communication over the telephone.*

**HOLE(S): PHOTO, AUDIO**

*Need a photo of a customer service representative using nonverbal means to communicate. Also need two audio files, once where the representative is “smiling” and one where s/he isn’t.*

| IMAGE(S)   | AUDIO   | LINKS  | DIRECTIONS                             |
|--|---|--|--|
| Image 1 = Photo of unsmiling CSR1 on telephone<br><br>Image 2 = Photo of smiling CSR1 on telephone | Audio 1 = Conversation between CSR1 and DMP1 where CSR1 is unenthusiastic and has no “smile” in their voice.<br><br>Audio 2 = Conversation between CSR1 and DMP1 where CSR1 is enthusiastic, smiling, happy to help | Image 1 = play Audio 1<br><br>Image 2 = play Audio 2 | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

**Nonverbal Telephone Communication**

Nonverbal communication is especially important when you are assisting your customer over the phone. Consider the last time you assisted a customer over the phone. What kind of nonverbal messages did you communicate to that customer? Did you:

- Smile (they might not see it, but they will hear it)
- Inject energy and strength into your voice
- Project confidence in yourself and your message
- Answer with a positive tone in your voice

To listen to some examples of nonverbal telephone skills, click on the photos at the left. Listen for the differences as the customer service representatives share their messages.

**SCREEN NUMBER: 8**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen identifies practices to avoid that will make communications better. Clicking on each practice brings up an example of that practice in the sidebar.*

**HOLE(S): CONTENT**

*Some of the content in the examples may need to be refined by Deseret Mutual so that it is more Deseret Mutual specific.*

| IMAGE(S) | AUDIO | LINKS   | DIRECTIONS                            |
|----------|-------|---|---------------------------------------|
| None     | None  | Making excuses<br><br>Non specific statements<br><br>Unnecessary details<br><br>Shifting blame<br><br>Command statements<br><br>Mention of other complaints<br><br>Quoting policy<br><br><i>Each link = show Sidebar text for that link</i> | Click on a <u>Link</u> to learn more. |

**CONTENT (APPEARS ON SCREEN):**

**Bad Communication Techniques**

Becoming an effective communicator takes practice. Below are several practices you should avoid when you communicate with your customers.

[Making excuses](#) Making excuses causes customers to feel that they are not very important to you, or to your business.

[Non specific statements](#) Non specific statements leave the customer wondering if their problem is going to be resolved.

[Unnecessary details](#) Providing unneeded information makes you and your associates look irresponsible.

[Shifting blame](#) Shifting blame to other areas of the company is not professional, and causes customers to wonder if you will be able to solve their problems.

[Command statements](#) Customers feel that they are being ordered to do something. Softening the statement allows customer to feel that they are in control.

[Mention of other complaints](#) Mentioning other or similar problems causes customers to wonder if your company is competent.

[Quoting policy](#) Being told “it’s policy” is frustrating. Knowing and understanding the reasons behind the policy help the customer to understand what is happening and why.

Click on each communication technique to see an example.

**[Sidebar]**

**Link that is clicked**

**Text that appears in sidebar**

Making excuses:

I’m sorry, but we’ve been so busy lately.

Non-specific statements:

I’ll try to get that for you tomorrow.

Unnecessary details:

Katie is at lunch right now. May I have her call you later?

Shifting blame:

Claims must have messed up again.

Command statements:

You will have to talk to someone in retirement.

Mention of other complaints: I’m sure we can fix that. We had the same problem last week.

Quoting policy:

Our policy won’t allow me to refund your money.



**SCREEN NUMBER: 9**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen identifies practices to implement that will make communications better. Clicking on each practice brings up an example of that practice in the sidebar.*

**HOLE(S): AUDIO, CONTENT**

*Audio file of customer service representative demonstrating congruence. Some of the content in the examples may need to be refined by Deseret Mutual so that it is more Deseret Mutual specific.*

| IMAGE(S) | AUDIO   | LINKS   | DIRECTIONS                                     |
|----------|---|---|--|
| None     | Audio 1 = CSR1 saying "Listen to difference in these messages:<br><br>Message 1 "Is there anything I can help you with?" in a tired voice<br><br>Message 2: "Is there anything I can help you with?" in a happy voice | Explain why<br><br>Offer alternatives<br><br>Concentrate on positive<br><br>Think before you speak<br><br>Demonstrate Congruence = play Audio 1<br><br><i>Each link (except for Congruence) = show Sidebar text for that link</i> | Click on a <a href="#">Link</a> to learn more. |

**CONTENT (APPEARS ON SCREEN):**

**Good Communication Techniques**

In addition to avoiding bad habits, you should cultivate good ones. To make your interactions with your customers more positive, try some of the following:

[Explain why](#) Don't just say you can't do it, let your customers know why you can't do what they have requested. Provide them with an explanation and details.

[Offer alternatives](#) Don't just tell your customers no, try to help them find alternative solutions to their problems.

[Concentrate on positive](#) If you are unable to assist a customer, don't let your interaction end there. Instead of focusing on what you can't do, focus on what you can provide them.

[Think before you speak](#) Take the time to organize your thoughts before you speak them. Think things through and make sure you understand what you are trying to say.

[Demonstrate congruence](#) Congruence means being in agreement or harmony with other elements. Your verbal and non-verbal communications with customers should always be congruent with one another. You don't want to send your customers mixed messages.

Click on each communication technique to see an example.

**[Sidebar]**

**Link that is clicked**

**Text that appears in sidebar**

Explain why:

I'll have to call you back this afternoon vs. I need to talk to the benefits department before I finish processing this claim. Can I call you later this afternoon, after I have spoken with them?

Offer Alternatives:

I can't pay that claim vs. I can't pay that claim, but I can.....

Concentrate on positive:

I can't do that vs. Here is what I can do.....

Think before you speak:

I'm going to need you to verify your mailing address, and oh, wait, I forgot that I'll need to, umm...well, I guess I can do that later. vs. First, I'll need to verify your mailing address. Then I'm going to ask you a few questions.

Demonstrate congruence:

Listen to the difference in these messages:  
Is there anything else I can help you with? *tired* vs.  
Is there anything else I can help you with? *cheerful*

**SCREEN NUMBER: 10**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This activity reinforces skills learned throughout the unit. Participants will listen to a detailed phone call, where many communication techniques are used (good and bad). They will then be asked to identify which techniques the caller exemplified, and which s/he failed to exhibit.*

**HOLE(S): GRAPHIC, PHOTO, AUDIO**

*Need an icon for activities.*

*Need a photo of a customer service representative, as well as an audio file to accompany the photo. Audio will include a phone conversation, where mainly good communication techniques covered in this unit will be used.*

| IMAGE(S)                           | AUDIO  | LINKS   | DIRECTIONS                             |
|------------------------------------|--|---|--|
| Image 1 = Graphic of Activity Icon | Audio 1 = conversation between CRS1 and DMP1 where several good customer service techniques are used | Image 2 = play Audio 1<br><br>Submit = show Feedback text | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

Click on the picture to start the audio. Listen for examples of the communication techniques we have identified in this unit.

**[Check Box]**

Which of the following techniques did CSR1 demonstrate? Check all that apply.

- Explain why
- Offer alternatives
- Concentrate on positive
- Think before you speak
- Congruence

**[Feedback]**

Option 1: Incorrect. The customer service representative also did/didn't do [x,y,z].

Option 2: Correct! The customer service representative addressed the customer's needs by [x,y,z].

However, did you notice that s/he failed to [d,e,f]?

Option 3: Correct! The customer service representative addressed the customer's needs by [x,y,z].

**SCREEN NUMBER: 11**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This activity reinforces skills learned throughout the unit. Participants will listen to a detailed phone call, where many communication techniques are used (good and bad). They will then be asked to identify which techniques the caller exemplified, and which s/he failed to exhibit.*

**HOLE(S): GRAPHIC, PHOTO, AUDIO**

*Need an icon for activities*

*Need a photo of customer service representative, as well as an audio file to accompany the photo. Audio will include a phone conversation, where mainly bad communications techniques covered in this unit will be used.*

| IMAGE(S)   | AUDIO  | LINKS   | DIRECTIONS                             |
|--|--|---|--|
| Image 1= Graphic of Activity Icon<br><br>Image 2 = Photo of CSR1 talking on the phone. | Audio 1 = conversation between CRS1 and DMP1 where several bad customer service techniques are used. | Image 2 = play Audio 1<br><br>Submit = show Feedback text | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

Click on the picture to start the audio. Listen for examples of the communication techniques we have identified in this unit.

**[Check Box]**

Which of the following did CSR1 demonstrate? Check all that apply.

- Made excuses
- Used non specific statements
- Provided unnecessary detail
- Shifted blame
- Used command statements
- Mentioned other complaints
- Quoted Policy

**[Feedback]**

Option 1: Incorrect. The customer service representative also did/didn't do [x,y,z].

Option 2: Correct! The customer service representative addressed the customer's needs by [x,y,z].

However, did you notice that s/he failed to [d,e,f]?

Option 3: Correct! The customer service representative addressed the customer's needs by [x,y,z].

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**SCREEN NUMBER: 12**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen summarizes the entire unit. A big red checkmark serves as an icon notifying users that they have completed the unit, and need to “check” and make sure they understand the points listed on this page.*

**HOLE(S): GRAPHIC**

*A graphic of a big red checkmark*

| IMAGE(S)                               | AUDIO | LINKS           | DIRECTIONS           |
|--|-------|-----------------|----------------------|
| Image 1 = Graphic of big red checkmark | None  | → = Splash Page | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Review**

The ability to communicate effectively is important to all customer service representatives. As you continue to communicate with others, focus on the words you use and impressions you are leaving, both verbally and nonverbally.

Convey confidence by:

Avoiding

- Excuses
- Unnecessary details
- Blame
- Command statements
- Policy statements

Continuing to

- Smile
- Project energy and confidence
- Explain why
- Offer alternative solutions
- Think before you speak

**Suggestions for Instructor-Led Activities:**

1. Have participants role play one-on-one with an instructor. The instructor acts as a customer, calling in with a problem about his/her account. Record the conversation on audio tapes, and have students analyze their own recordings, according to the communication techniques discussed in this unit
2. Have participants role play with one another. One acts as a customer coming into the office to discuss a problem with his/her account. The other acts as a customer service representative, and assists the customer. Participants should critique one another on what kinds of nonverbal message they are sending, as well as what other types of communication skills they are using.

---

**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about what communication is and why it is important. It also provides an overview of the rest of unit. We show a graphic of our Deseret Mutual employee “Dan. The graphic is accompanied by an audio file that narrates the content when the page is opened.*

**HOLE(S): PHOTO, AUDIO**

*Need a photo of Dan, as well as an audio file to accompany the photo.*

| <b>IMAGE(S)</b>       | <b>AUDIO</b>                            | <b>LINKS</b>         | <b>DIRECTIONS</b>    |
|-----------------------|---|----------------------|----------------------|
| Image 1= Photo of Dan | Audio 1= Narration of on-screen content | Image 1=play Audio 1 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

At Deseret Mutual, our customers place a great deal of emphasis on the service they receive from us. When they have a positive experience here, they are more likely to return and look forward to doing business with us again. As customer service representatives for Deseret Mutual, we are in charge of making sure that our customers have a positive experience with Deseret Mutual, a WOW experience that causes them to return again and again.

In many instances, our only interaction with customers may be over the telephone. For this reason, it is extremely important that our telephone interaction be positive and professional.

This unit presents overall guidelines and specific techniques that will assist you in making each customer’s telephone exchange with Deseret Mutual a positive one.



## SCREEN NUMBER: 2

TEMPLATE TYPE: CS-4A

FUNCTIONALITY: CONTENT/EXAMPLE

*This screen provides overall guidelines and things to be aware of when communicating with customer over the telephone. An audio example emphasizing the four main points can be accessed by clicking on the link.*

### HOLE(S): PHOTO, AUDIO

*Need a photo of a customer service representative as well as an audio file to accompany the photo.*

| IMAGE(S)  | AUDIO   | LINKS                  | DIRECTIONS                             |
|---|---|------------------------|--|
| Image 1 = Photo of CSR1 to represent the audio voice you hear | Audio 1 = conversation between CSR1 and DMP1 where CSR1 demonstrates each of the guidelines in action | Image 1 = play Audio 1 | Click on a picture to hear an example. |

### CONTENT (APPEARS ON SCREEN):

#### Overall Guidelines

Customers base their perceptions of you (and ultimately of Deseret Mutual) on your tone of voice and the manner in which you facilitate the phone call, as well as the words you use. To make a positive impression it is important that you project a positive and friendly manner. To help you achieve this, we recommend the following guidelines:

*Personalize the conversation by using your customer's name.* Doing so will help you establish a rapport with your customers, and help them build a positive relationship with you.

*Give your customers feedback.* Help them to know and understand what you are doing, and what progress you are making towards solving their problem. If, for example, you are waiting for your computer to process customer information, let your customer know that you have entered the information, and are waiting for it to be processed.

*Give your customers your full attention, take an interest in them.* Don't be nosy, but when they do volunteer information, acknowledge that information in an appropriate way. If necessary, take notes about your conversation. This will help you to keep your focus on your customer and provide a handy reference for later.

*Maintain a professional attitude with your customer.* Be aware of any background noise that may be distracting (music playing, papers shuffling, other office conversations). Be prepared to answer any questions your customers may have. Always use correct grammar. And finally, never chew gum, eat or drink while speaking with customers.

Click the photo to see how the customer service representative integrates these guidelines into their conversation.

---

**SCREEN NUMBER: 3**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides an introduction/framework for the rest of this unit. Each of the phases is a hot link that will take the participant directly to that section of the course to learn more about that particular phase.*

**HOLE(S): GRAPHIC**

*Need a graphic of a telephone*

| IMAGE(S)                      | AUDIO | LINKS   | DIRECTIONS                            |
|-------------------------------|-------|---|---------------------------------------|
| Image 1 =Graphic of telephone | None  | Answering the Call = Screen 3A<br><br>Placing Your Customer on Hold = Screen 3B<br><br>Transferring Your Customer = Screen 3C<br><br>Closing the Call = Screen 3D | Click on a <u>Link</u> to learn more. |

**CONTENT (APPEARS ON SCREEN):**

**Phases of Telephone Calls**

Now that we've discussed some overall guidelines, let's get into the specifics of the actual telephone experience.

There are typically four phases within a telephone call. These include:

- [Answering the Call](#)
- [Placing Your Customer on Hold](#)
- [Transferring Your Customer](#)
- [Closing the Call](#)

Not all calls will contain every phase, but some will. Select each phase to learn about it in more detail.

**SCREEN NUMBER: 3A**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen outlines the steps involved in answering the telephone call. Information in the side bar provides a quick review/bullet point list of the concepts covered. Clicking next will return the participant to the telephone phases menu screen.*

**HOLE(S): GRAPHIC**

*Need graphic of a telephone being picked up.*

| IMAGE(S)   | AUDIO | LINKS        | DIRECTIONS           |
|--|-------|--------------|----------------------|
| Image 1 = Graphic of a telephone being picked up | None  | → = Screen 3 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Answering the Call**

Remember the last time you called a customer service hotline? How many times did the telephone ring before you picked it up? How did that make you feel?

As a customer service representative, it is very important that you answer the telephone quickly, within 2-3 rings. Allowing the telephone to continue ringing signals to your customers that their calls are not very important to you.

When you answer the telephone, it is important to greet the customer, identify yourself by name and department, and offer to assist them. Including these elements in your greeting gives customers a reassurance that they have called the right place, helps them relax and lets them know that you are ready and willing to assist them.

**[Sidebar]**

When answering the telephone, remember to:

1. Greet the caller
2. Give the name of your department
3. State your name
4. Offer assistance

---

**SCREEN NUMBER: 3B**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen outlines the steps involved in placing customers on hold. Information in the side bar provides a quick review/bullet point list of the concepts covered. Clicking next will return the participant to the telephone phases menu screen.*

**HOLE(S): GRAPHIC, CONTENT**

*Need a graphic of the hold button. Some of the steps for placing a call on hold may need to be refined by Deseret Mutual so that it is more Deseret Mutual specific.*

| IMAGE(S)                               | AUDIO | LINKS        | DIRECTIONS           |
|--|-------|--------------|----------------------|
| Image 1 = Graphic of the "HOLD" button | None  | → = Screen 3 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Placing Your Customer on Hold**

Placing customers on hold should be done only when necessary, such as when you have to physically leave your desk or telephone to get information, or when another urgent call is coming through. If you have to leave your customers for any reason, be sure to place them on hold. You never know what background noises and events customers might hear while you're gone.

When putting customers on hold, always explain why you are going to do so. Ask permission to place them on hold, give them a chance to respond, and honor their request. If your customer is unwilling or unable to hold, do what you can to assist them then and there.

When you do place customers on hold, if the problem cannot be solved in a reasonable amount of time, get their contact information and offer to call them back within a specified timeframe. Most customers do not like to be kept waiting for more than a minute.

**[Sidebar]**

When placing a customer on hold:

1. Explain why you placing them on hold
2. Ask permission to place them on hold
3. Allow them to respond and honor their request
4. Offer to call back if necessary

**SCREEN NUMBER: 3C**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen outlines the steps involved in transferring customers. Information in the side bar provides a quick review/bullet point list of the concepts covered. Clicking next will return the participant to the telephone phases menu screen.*

**HOLE(S): GRAPHIC, CONTENT, AUDIO**

*Need a graphic of multiple telephones, with arrows representing transfers. Some of the steps to transfer may need to be refined by Deseret Mutual so that it is more Deseret Mutual specific. Also, a customer testimonial will need to be recorded.*

| IMAGE(S)  | AUDIO   | LINKS                                  | DIRECTIONS                             |
|---|---|--|--|
| Image 1 = Graphic of multiple phones, with many lines and arrows between/around them representing transfers | Audio 1 = testimonial of a good transfer experience | Image 1 = play Audio 1<br>→ = Screen 3 | Click on a picture to hear an example. |

**CONTENT (APPEARS ON SCREEN):**

**Transferring Your Customer**

There is nothing more frustrating to customers than being passed around to three different people before finding the “right” one to resolve their concerns. As a customer service representative, you can’t guarantee that a customer will contact the right person in the right department, but when they don’t you can make their life (and yours!) a lot easier by helping them efficiently find the right person.

When it becomes necessary to transfer a customer, there are several steps to keep in mind. Explain to your customer why you would like to transfer them, then ask your customer permission to transfer them. This allows the customer to maintain a feeling of control in the situation.

Always bring the third party on the line, and determine if they are the correct person to take the call. Not only will your customer appreciate this, you will appreciate it as well when other customer service representatives return the favor! When you bring the third party on the line, provide them with the name of the customer and a brief explanation of the situation so your customer doesn’t have to. Finally, bring your customer back on the line and introduce your customer to the third party before exiting the call.

**[Sidebar]**

When transferring a customer:

1. Explain what you are doing and why
2. Ask permission to transfer the call
3. Determine if third party is the correct person to take the call.
4. Brief the third party on the situation
5. Introduce customer and third party

---

**SCREEN NUMBER: 3D**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen outlines the steps involved in closing the call. Information in the side bar provides a quick review/bullet point list of the concepts covered. Clicking next will return the participant to the telephone phases menu screen.*

**HOLE(S): GRAPHIC**

*Need a graphic of a telephone being hung up.*

| IMAGE(S)                                   | AUDIO | LINKS        | DIRECTIONS           |
|--|-------|--------------|----------------------|
| Image 1 = Graphic of a phone being hung up | None  | → = Screen 3 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Closing the Call**

As the call comes to a close, it is your responsibility to make sure that it ends on a positive note, that your customer is satisfied, and that your customer knows what to expect in the future.

Before ending the call, verify with your customers that all their questions and concerns have been addressed. If any of their concerns or problems are still unresolved, establish a plan of action to resolve them. As part of that plan, establish a timeframe for resolving concerns and decide how to communicate with your customer going forward. And finally, provide your customer with any additional information they may need, such as a telephone number where you can be reached in the future.

**[Sidebar]**

When closing the call:

1. Verify with the customer that all their questions and concerns have been addressed
2. List any further actions that need to be taken
3. Establish a timeframe for those actions to be completed
4. Provide the customer with any additional information they may need (including a way to contact you again)



---

**SCREEN NUMBER: 4**

**TEMPLATE TYPE: CS-4A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about using voicemail. It includes directions/instructions for information to leave in outgoing messages. Information in the side bar provides a quick review/bullet point list of the concepts covered.*

**HOLE(S): GRAPHIC**

*Need a graphic of a telephone with a flashing red voicemail light.*

| IMAGE(S)   | AUDIO | LINKS | DIRECTIONS           |
|--|-------|-------|----------------------|
| Image 1 = Graphic of telephone with flashing red voicemail light | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Using Voicemail**

There may be times when a customer needs to get information to you, but is unable to reach you directly. When this happens, customers are usually directed to your voicemail. With voicemail, as with all your customer interactions, you want your customers to leave having had a positive experience. The way you handle and respond to your voicemail can have a significant impact on your customers' impressions and experiences with Deseret Mutual.

You should provide your customers with an accurate, up-to-date voicemail message. The message should let your customers know who you are, and what department you represent. You should also make them aware of where you are and when you'll be back. Answer their questions, such as: Are you in the office? Out of the office? Are you checking your messages? How often? Who can they contact in case of an emergency? What kind of information should they leave for you? Having access to this information allows customers to once again feel in control of the situation. If they know you aren't in the office, they have the option of either leaving you a message (knowing you won't get back to them for a couple of days) or contacting someone else in the organization who can help them.

Respond promptly to your voicemail. Even if the message your customer left isn't urgent, they expect you to act on it when you get back. Following up with your customers lets them know you received their message, that you are working on resolving their concerns, and most importantly, that their call was important to you.

**[Sidebar]**

Let your customers know:

- Your name and what department you represent
- Whether or not you are in the office
- When you will be checking messages
- Who to contact in an emergency
- What kind of information they should leave for you (phone number, name, date, time, etc.)

## SCREEN NUMBER: 5

TEMPLATE TYPE: TO BE DEVELOPED

FUNCTIONALITY: ACTIVITY

*This screen provides participants with an opportunity to reflect on what they have learned. Participants are asked to answer questions. Answers are not “graded,” but general feedback is provided.*

HOLE(S): GRAPHIC

*Need an icon for activities*

| IMAGE(S)                           | AUDIO | LINKS                       | DIRECTIONS                  |
|------------------------------------|-------|-----------------------------|-----------------------------|
| Image 1 = Graphic of Activity Icon | None  | Submit = show Feedback text | Click Submit when finished. |

## CONTENT (APPEARS ON SCREEN):

### Activity

#### [Check Box]

What kinds of information should be recorded on your voice mail message? Check all that apply.

- When you will be checking message
- Who you went to lunch with
- How long you will be gone
- Where you are
- Whether you are in or out of the office
- Who to contact in case of an emergency
- Your home phone number

**[Feedback]** When recording your outgoing message, leave customer with enough, but not too much information. You should let customer know whether you are in or out of the office, but don't worry about providing an exact location. Let customers know if you are checking voicemail, and when they can reasonably expect to hear back from you. Also, let them know who to contact in case of an emergency.

---

**SCREEN NUMBER: 6**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This screen provides participants with an opportunity to reflect on what they have learned. Participants are asked to answer questions. Answers are not “graded”, but general feedback is provided.*

**HOLE(S): GRAPHIC**

*Need an icon for activities*

| IMAGE(S)                           | AUDIO | LINKS                       | DIRECTIONS                  |
|------------------------------------|-------|-----------------------------|-----------------------------|
| Image 1 = Graphic of Activity Icon | None  | Submit = show Feedback text | Click Submit when finished. |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Input Field]**

What steps should you follow when transferring a customer?

*Input field for participant response*

**[Feedback]** Did you remember to ask permission to transfer, to provide the customer with the 3<sup>rd</sup> party name and number, and to brief the 3<sup>rd</sup> party on the situation?

**[Input Field]**

List four things you can do to project a positive and friendly manner to your customer.

*Input field for participant response*

**[Feedback]** To project a positive and friendly manner, use the customer’s name, give your customer feedback, focus your attention on your customer and maintain a professional attitude.

**SCREEN NUMBER: 7**

**TEMPLATE TYPE: TO BE DEVELOPED**

**FUNCTIONALITY: ACTIVITY**

*This screen provides participants with an opportunity to listen to actual phone calls, and critique each call based on what they have learned. After listening to the audio file, participants can evaluate the caller by filling out the form. Answers are not “graded”, but general feedback is provided.*

**HOLE(S): GRAPHIC, PHOTO, AUDIO**

*Need an icon for activities*

*Need a photo of a customer service representative answering a phone call, as well as an audio file to accompany the photo.*

| IMAGE(S)  | AUDIO   | LINKS                       | DIRECTIONS                             |
|---|---|-----------------------------|--|
| Image 1 = Graphic of Activity Icon                | Audio 1= Conversation between CSR1 and DMP1 where CSR1 is doing most of the “right things”, calling customer by name, asking permission to transfer, listening to them, but not doing a “warm transfer” | Image 2 = play Audio 1      | Click on a picture to hear an example. |
| Image 2 = Photo of a CSR1 answering the telephone |   | Submit = show Feedback text | Click Submit when finished.            |

**CONTENT (APPEARS ON SCREEN):**

**Activity**

**[Input Field]**

What did this customer service representative do well?

*Input field for participant response*

**[Feedback]**

Did you notice that the CSR greeted the customer, introduced himself, called customer by name?

**[Input Field]**

Could this call be improved? How?

*Input field for participant response*

**Unit 7: Telephone Tactics**

**[Feedback]**

Did you notice that the representative didn't identify which department he was with? Had he done so in the first place, it would have saved the customer time. Also, when transferring the call, he did not introduce the customer or explain the customer's situation to the third party.

---

**SCREEN NUMBER: 8**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen summarizes the entire unit. A big red checkmark serves as an icon notifying users that they have completed the unit, and need to “check” and make sure they understand the points listed on this page.*

**HOLE(S): GRAPHIC**

*A graphic of a big red checkmark*

| IMAGE(S)                               | AUDIO | LINKS           | DIRECTIONS           |
|--|-------|-----------------|----------------------|
| Image 1 = Graphic of big red checkmark | None  | → = Splash Page | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Review**

When assisting customers via the telephone, remember to:

- Greet the customer
- Provide the customer with your department and name
- Personalize the conversation using customer’s name
- Provide customers with feedback and an explanation of what you are doing
- Ask permission before transferring or placing on hold
- Provide any additional information customer may need
- Establish a time frame to complete any follow-up action

When using voicemail, include:

- Your name and department
- Whether or not you are in the office
- When you will be checking messages
- Who to contact in an emergency
- What information you need from customer

**Unit 7: Telephone Tactics**

**Suggestions for Instructor-Led Activities**

1. Walk participants through the technical aspects of putting customers on hold by explaining how the phone/phone system at Deseret Mutual works. Have participants practice both the technical aspects and the procedures discussed in this unit as they role play with one another.
2. Walk participants through the technical aspects of transferring calls. Have participants practice both the technical aspects and the warm transfer discussed here as they role play with one another.



---

**SCREEN NUMBER: 1**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen provides information about what written communication is and why it is important. It also provides an overview of the rest of unit. We show a graphic of our Deseret Mutual employee “Dan. The graphic is accompanied by an audio file that narrates the content when the page is opened.*

**HOLE(S): PHOTO, AUDIO**

*Need a photo of Dan, as well as an audio file to accompany the photo.*

| IMAGE(S)              | AUDIO                                   | LINKS                | DIRECTIONS           |
|-----------------------|---|----------------------|----------------------|
| Image 1= Photo of Dan | Audio 1= Narration of on-screen content | Image 1=play Audio 1 | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

At Deseret Mutual, most of our contact with customers is over the phone or in person. There are times however, when direct communication with our customers in person or over the telephone is not possible. We may be unable to reach our customer by telephone, we may need to send them additional information, we may need to create a paper trail, or we may need a customer confirmation or signature on certain documents. In these instances, we must use some form of written communication.

In this unit, you will learn about Deseret Mutual’s’ policy regarding written correspondence. You will also review guidelines for writing letters and emails to your customers.

---

**SCREEN NUMBER: 2**

**TEMPLATE TYPE: CS-5A**

**FUNCTIONALITY: CONTENT**

*This screen introduces participants to two different forms of written communications: email and letters. It also provides information about when each form should be used (under what circumstances).*

**HOLE(S): CONTENT, GRAPHIC**

*What is Deseret Mutual's policy involving when to send a letter vs. when to send an email?*

| IMAGE(S)                      | AUDIO | LINKS | DIRECTIONS           |
|-------------------------------|-------|-------|----------------------|
| Image 1 = Graphic of an email | None  | None  | Click → to continue. |
| Image 2 = Graphic of a letter |       |       |                      |

**CONTENT (APPEARS ON SCREEN):**

**Types of Written Correspondence**

The most common forms of written communication include letters and email.

**[When would you send a letter vs. an email**

**Include appropriate instances of both types of correspondence]**

Regardless of which form your communication takes, it is important to remember that any correspondence representing Deseret Mutual is a legally binding document, and as such must go through a detailed editorial and review process.

---

**SCREEN NUMBER: 3**

**TEMPLATE TYPE:**

**FUNCTIONALITY: CONTENT**

*This screen provides information about Deseret Mutual's letter writing policy and guidelines.*

**HOLE(S): CONTENT**

*What is Deseret Mutual's official letter or email writing policy?*

| IMAGE(S) | AUDIO | LINKS | DIRECTIONS           |
|----------|-------|-------|----------------------|
| None     | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Deseret Mutual's Policy**

**[Information from Deseret Mutual's official letter or email writing policy]**

---

**SCREEN NUMBER: 4**

**TEMPLATE TYPE: CS-3A**

**FUNCTIONALITY: CONTENT/EXAMPLE**

*This screen provides participants with writing tips. These tips can be used in both email and letter correspondence.*

**HOLE(S): CONTENT/EXAMPLE**

*It might be appropriate to use this as a menu page, with each tip being a link. The link will take the participant to a separate page. That page would explain each tip in greater detail and provides an example.*

| IMAGE(S) | AUDIO | LINKS | DIRECTIONS           |
|----------|-------|-------|----------------------|
| None     | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Writing Tips**

Regardless of whether you are corresponding through an email or a letter, there are several things you can do to ensure that you effectively meet the needs of the customer. We recommend following these guidelines:

*Know your customer*

Knowing and understanding your customers and their problems is just as critical in written communication as it is in verbal communication. If you don't understand the problems your customers are facing, it is difficult to help resolve them.

*Avoid jargon and acronyms*

Using jargon or acronyms confuses your customer. When writing, be sure to use words and phrases your customer understands and is familiar with.

*Be brief*

Get to the point as quickly as possible. Don't clutter the communication with unnecessary details. Use short, easy-to-understand sentences. If possible, keep the correspondence to one page or less.

*Personalize*

Let your customer know there is a real person on the other end of the letter or email. Keep your tone friendly and positive. Use the customer's name when possible.

*Be Professional*

Your written documents reflect back on you and on Deseret Mutual. In order to come across as a professional person and organization, make sure that your correspondence is concise and orderly. Be sure to proofread and spell-check the document. Don't use excessive italics, bold, or other formatting elements, especially in email. For letters, use Deseret Mutual letterhead, or other appropriate forms.

*Be Clear*

Let your customer know what is happening, and what action (if any) you expect from them. If your correspondence requires any follow-up, let your customer know what action they need to take, and a deadline for completion. Include any forms you want your customer to send back to you. Areas that the customer needs to fill out should be clearly identified.

**SCREEN NUMBER: 5**

**TEMPLATE TYPE: CS-6A**

**FUNCTIONALITY: EXAMPLE**

*This screen contains an example of a well written letter, and an example of a poorly constructed letter. Participants are asked to reflect on which letter they would rather receive.*

**HOLE(S): GRAPHIC**

*Need a graphic of a well written letter, and a graphic of a letter with lots of mistakes. This might be a good place for an activity as well. Instead of just reflecting on which letter they would like to receive, participants could be asked to identify (from a checkbox) what is wrong with the "bad" letter and what they like about the "good" letter.*

| IMAGE(S)   | AUDIO | LINKS | DIRECTIONS           |
|--|-------|-------|----------------------|
| Image 1 = Graphic of a well written, professional, friendly letter<br><br>Image 2 = Graphic of a letter with lots of acronyms, rambling, confusing | None  | None  | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

Which letter would you rather receive? Why?

---

**SCREEN NUMBER: 6**

**TEMPLATE TYPE: CS-4A/8A**

**FUNCTIONALITY: CONTENT**

*This screen summarizes the entire unit. A big red checkmark serves as an icon notifying users that they have completed the unit, and need to “check” and make sure they understand the points listed on this page.*

**HOLE(S): GRAPHIC**

*A graphic of a big red checkmark*

| IMAGE(S)                               | AUDIO | LINKS           | DIRECTIONS           |
|--|-------|-----------------|----------------------|
| Image 1 = Graphic of big red checkmark | None  | → = Splash Page | Click → to continue. |

**CONTENT (APPEARS ON SCREEN):**

**Review**

As you complete this unit, take a moment to review and reflect on the following concepts;

Written communications takes two forms:

- Letters
- Emails

When writing, you should:

- Know your customer
- Avoid jargon and acronyms
- Be brief
- Be professional
- Personalize
- Be clear

**Suggestions for Instructor-Led Activities:**


1. Give participants a scenario and ask them to write a letter in response. Have participants critique one another's letters
2. Give participants a letter and ask them to critique it according to the techniques discussed in this unit.



## Appendix C

### Templates

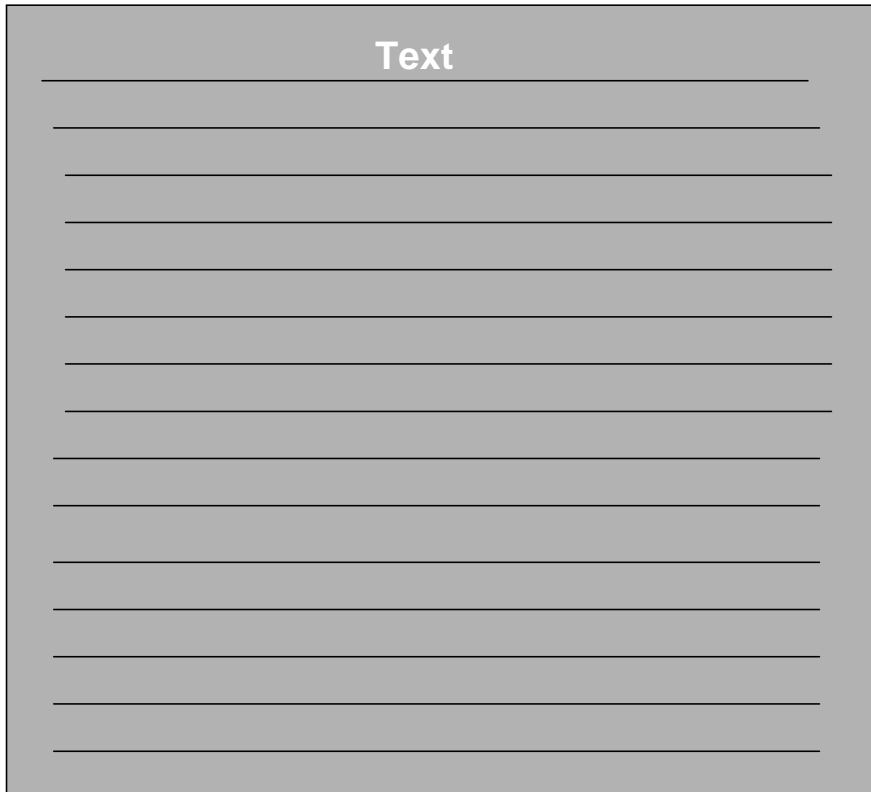
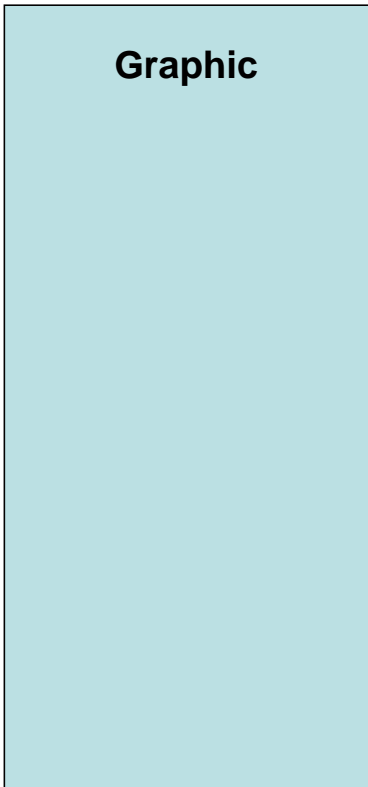


|   |   |
|---|---|
| <b>Logo</b>   | <b>Unit Title: Subtitle</b>   |
| <b>Menu</b><br>Links to units<br>Links to units<br>Links to units<br>Links to units<br>Links to units<br>Links to units | <b>Content Frame</b>  |
| Slide x of n  | Directions (text)  |



# Content Template

Used for presenting information, examples, and reviews



**Text**

A gray rectangular box with a black border, intended for text. The word "Text" is written in bold black text at the top center. Below the word are 15 horizontal lines for text entry.

# Content Template

Used for presenting information, examples, and reviews



**Graphic**



**Text**



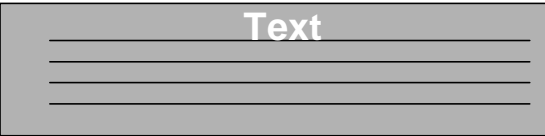
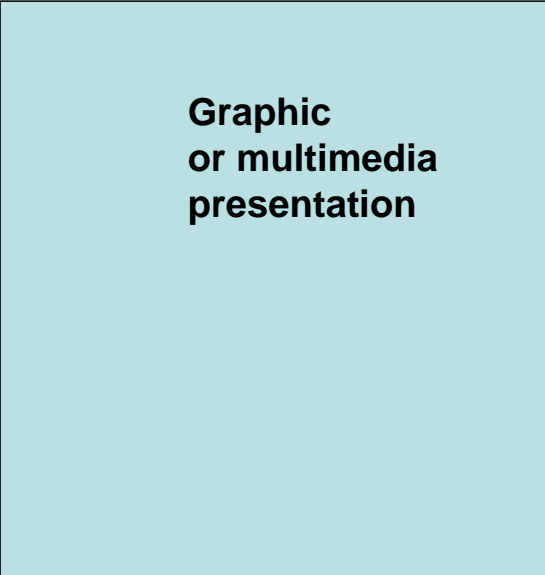
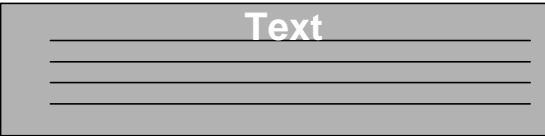
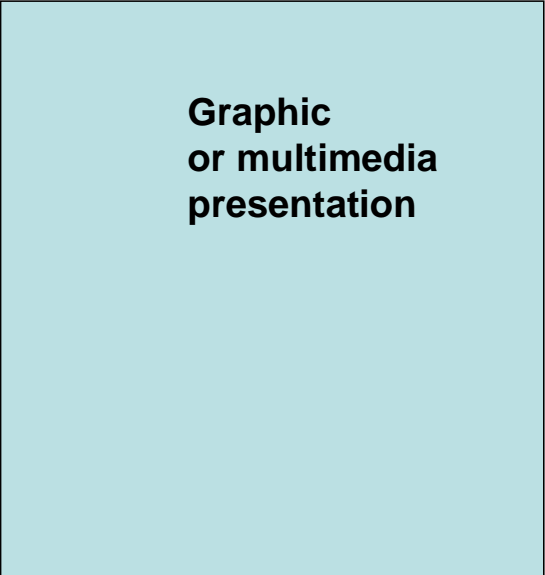
**Graphic**



**Text**

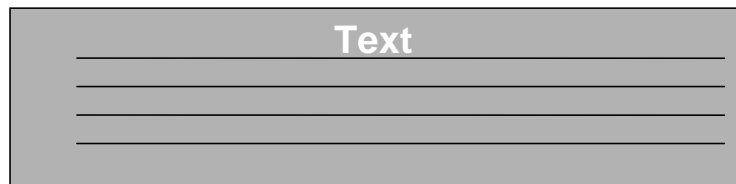
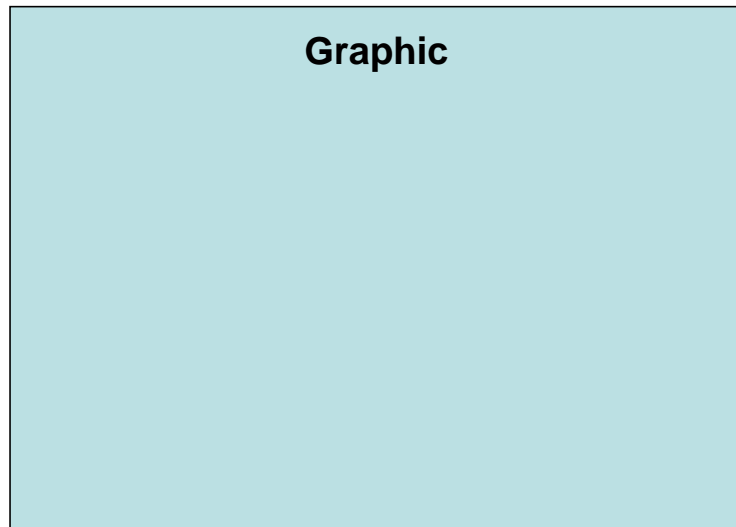
# Content Template

Used for presenting information, examples, and reviews



# Content Template

Used for presenting information, examples, and reviews



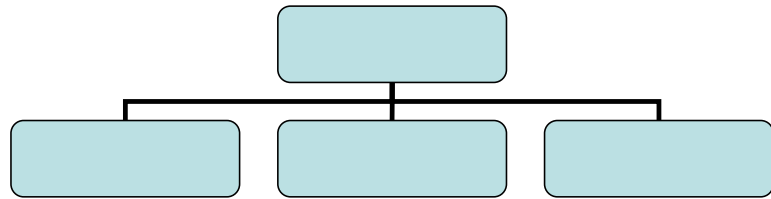


# Content Template

Used for presenting information, examples, and reviews



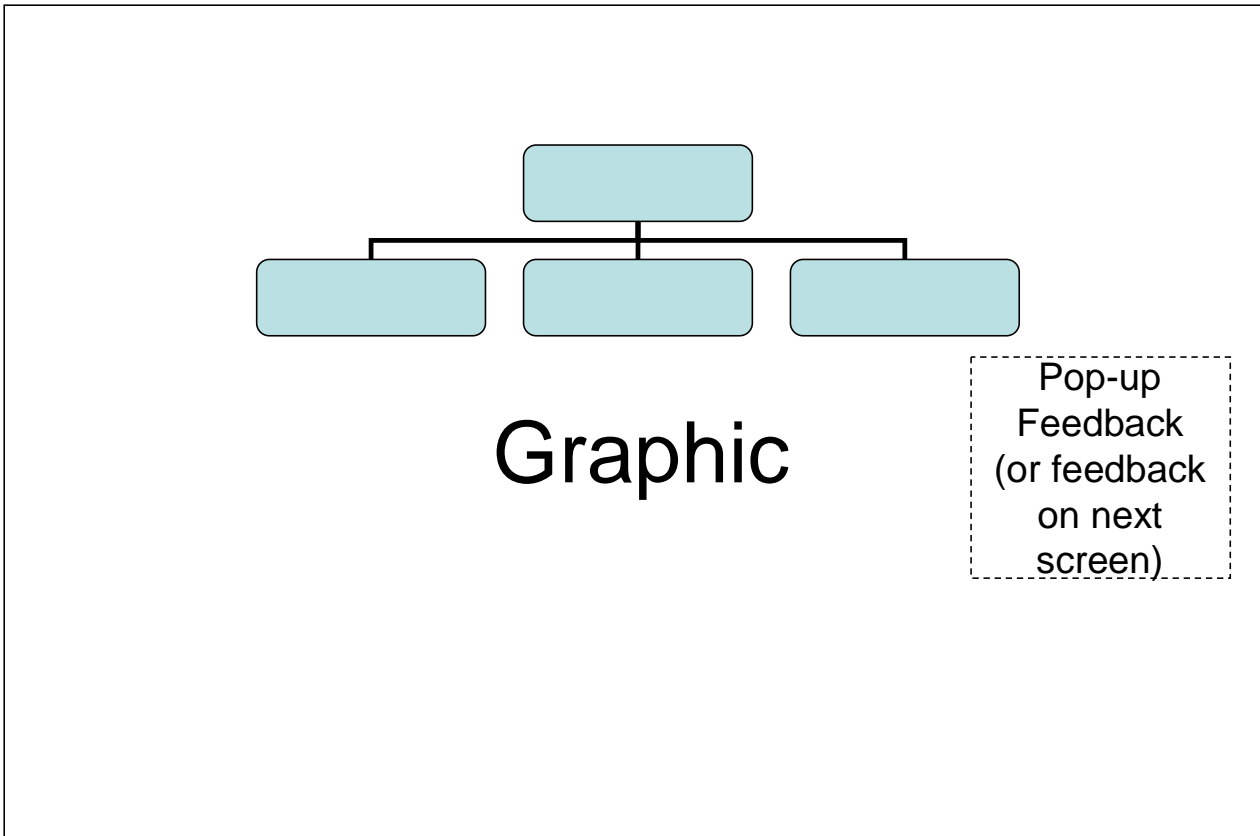
# Activity Template



Graphic

Feedback (text)

# Activity Template

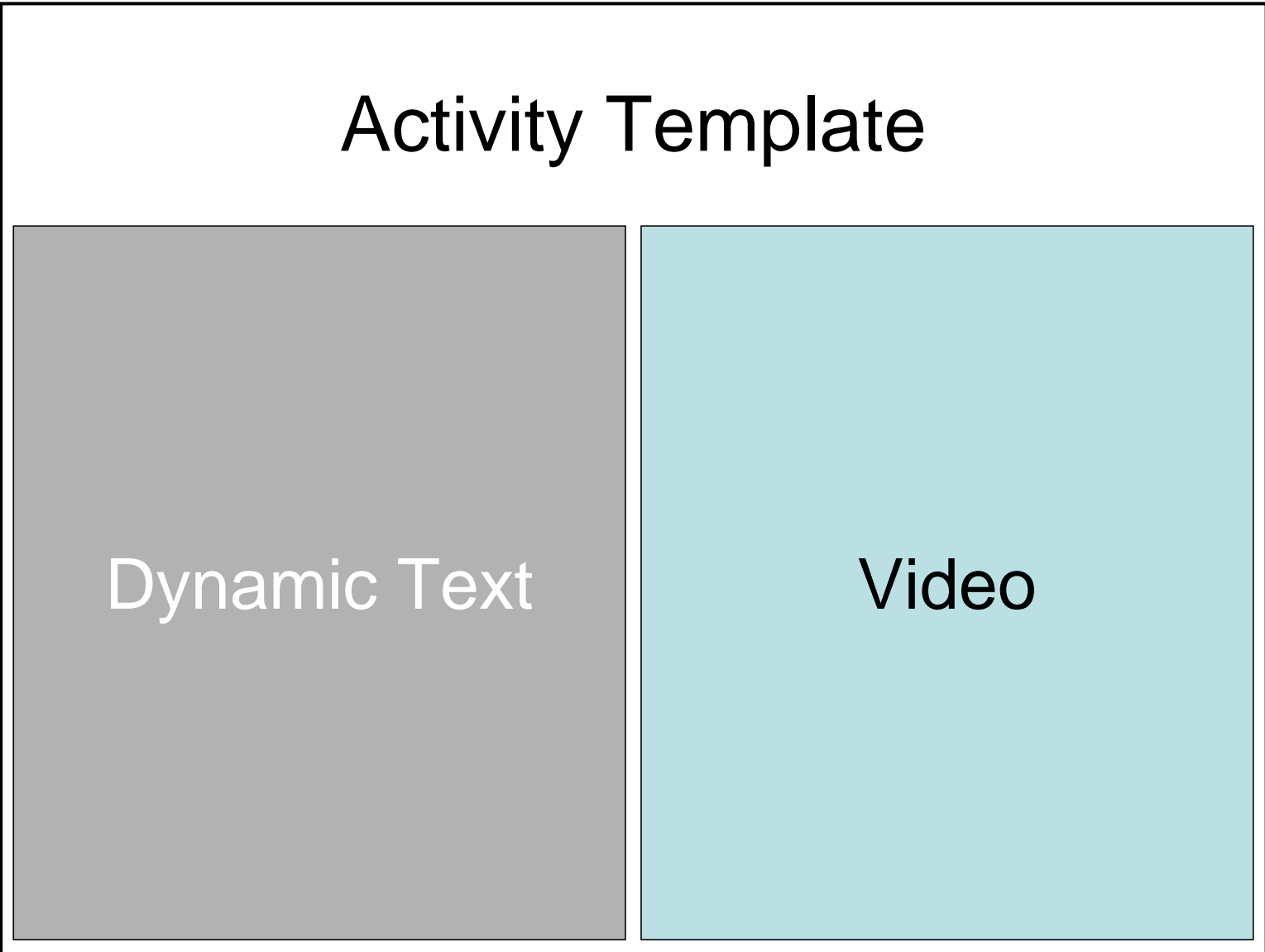


# Activity Template

Graphic/  
Audio/  
Video/  
Text

Checklist/  
Options/  
Answers  
(text)

Feedback (text)



# Activity Template

Question (text)

Graphic/  
Audio/  
Video/  
Text

1. Hidden Text (revealed when input text matches this text)
2. Hidden Text
3. Hidden Text
4. Hidden Text
5. Hidden Text

Input text field

Submit

# Activity Template

Question (text)

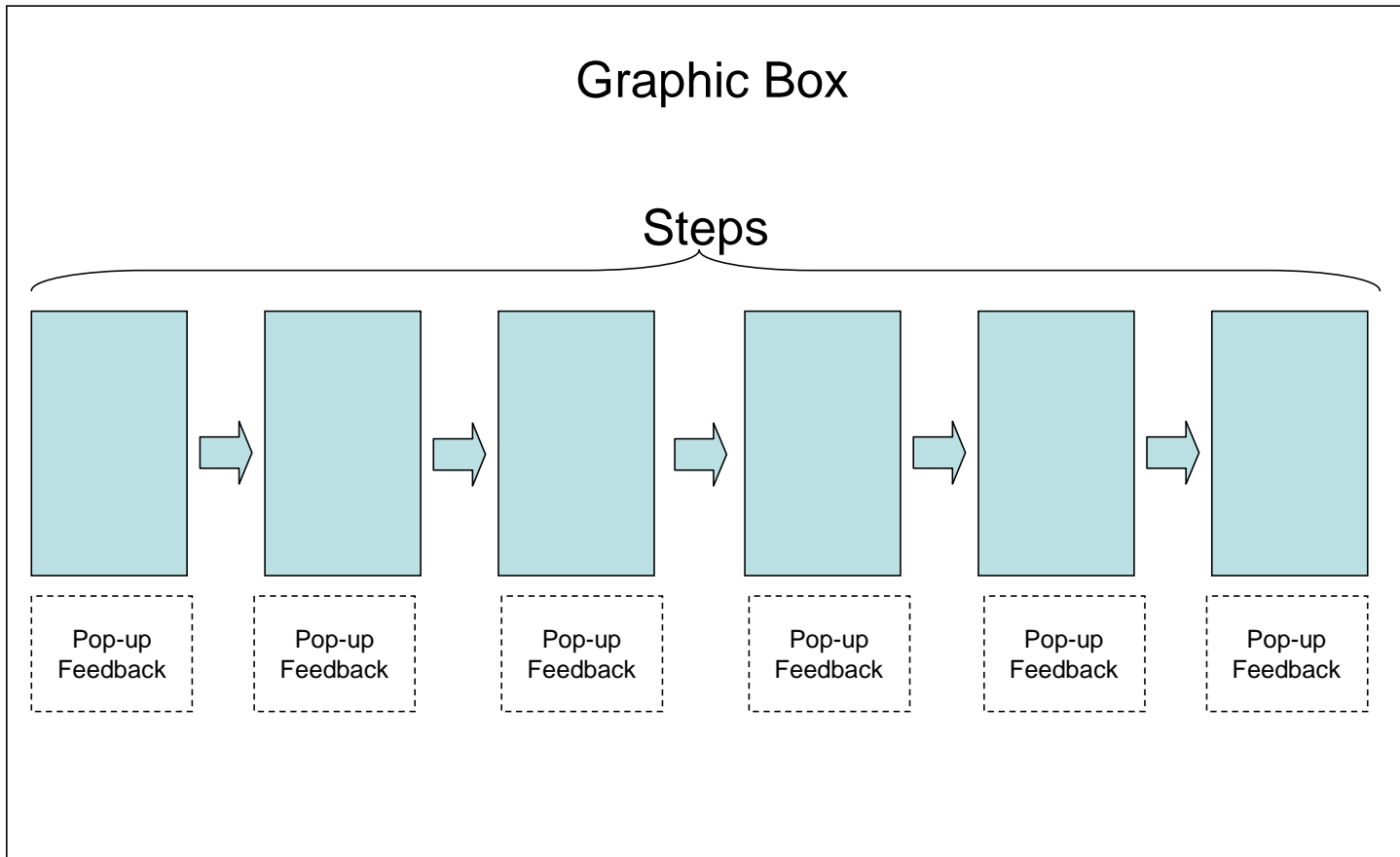
Graphic/  
Audio/  
Video/  
Text

1. Hidden Text (revealed when input text matches this text)
2. Hidden Text
3. Hidden Text
4. Hidden Text
5. Hidden Text

Input text field

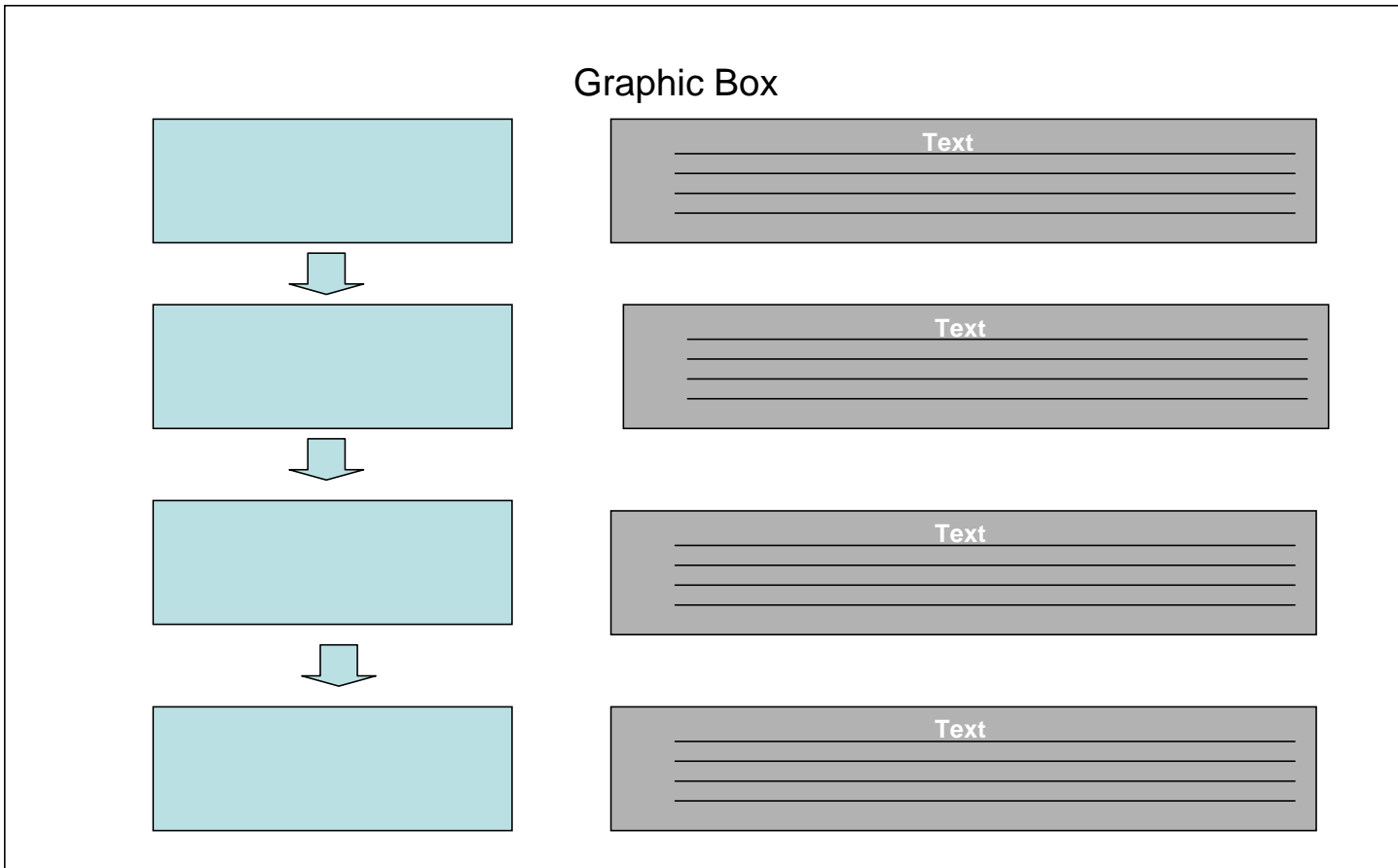
Submit

# Flowchart Template





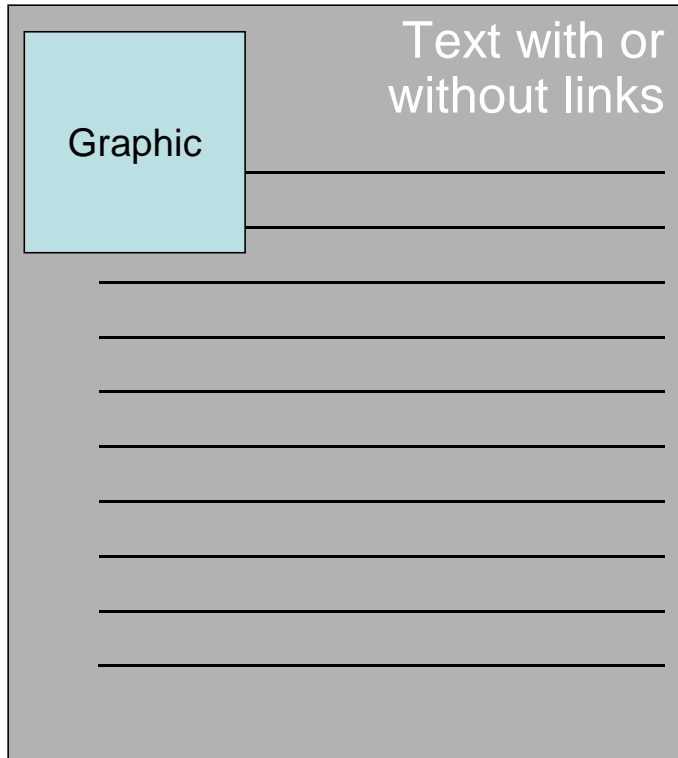
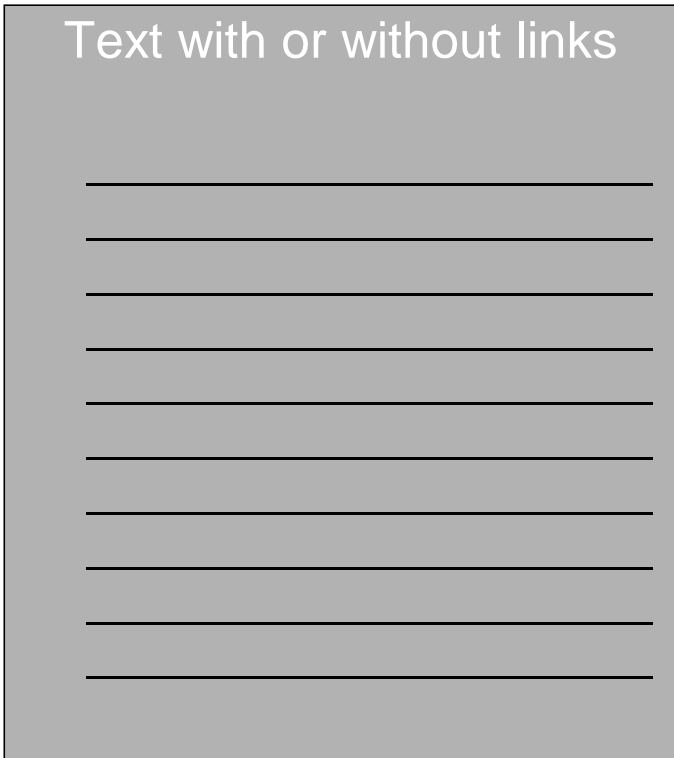
# Flowchart Template







# Pop-Up Templates



|   |   |   |
|---|---|---|
| <b>Logo</b>   | <b>Unit Title: Subtitle</b>   |   |
| <b>Menu</b><br>Links to units<br>Links to units<br>Links to units<br>Links to units<br>Links to units<br>Links to units | <b>Question (text)</b>  |   |
|   | <b>Graphic/<br/>Audio/<br/>Video/<br/>Text</b>  | <ol style="list-style-type: none"><li>1. Hidden Text (revealed when input text matches this text)</li><li>2. Hidden Text</li><li>3. Hidden Text</li><li>4. Hidden Text</li><li>5. Hidden Text</li></ol> |
|   | <input type="text"/> <b>Input text field</b> <input type="button" value="Submit"/>                              |   |
| Slide x of n  | <input type="text"/> <b>Directions (text)</b> <input type="button" value="◀"/> <input type="button" value="▶"/> |   |

**SCREEN NUMBER: 1, 2, 3A, ETC.**

**TEMPLATE TYPE: CS-1, CS-4A, ETC.**

**FUNCTIONALITY: CONTENT, EXAMPLE, ACTIVITY, OR POP-UP**

*Description (required)*

**HOLE(S): GRAPHIC, AUDIO, PHOTO, CONTENT, EXAMPLE**

*Description (if necessary)*

| IMAGE(S)                                  | AUDIO   | LINKS   | DIRECTIONS                                |
|---|---|---|---|
| Image 1=<br>Graphic of XXXX               | Audio 1=<br>Narration of on-<br>screen content  | Image 1=play Audio<br>1                       | Click → to continue.                      |
| Image 2=<br>Photo of XXX with<br>XXX prop | Audio 2=<br>Conversation<br>between CSR1 and<br>CST1 where CSR<br>doesn't show<br>empathy | Attitude=Screen 4                             | Click on a picture to<br>hear an example. |
|   | Audio 3=<br>Conversation<br>between CSR2 and<br>CST2 where CSR<br>does show empathy       | Building<br>Relationships=Unit<br>4, Screen 1 | Click on a <u>Link</u> to<br>learn more.  |
|   |   | Submit=show<br>Feedback text                  | Click Submit when<br>finished.            |
|   |   | Making<br>Excuses=show<br>Sidebar text        | Click Close when<br>finished.             |

**CONTENT (APPEARS ON SCREEN):**

**Header**

Text.

**[Sidebar]**

Header:

- Text 1
- Etc.

**[Check Box]**

Question.

- Option 1
- Etc.

**[Input Field]**

Question or prompt.

**[Feedback]**

Two or three sentences of feedback text.

**TEMPLATE TYPE: CS-3A**

**FUNCTIONALITY: CONTENT**

*Glossary of terms to know for Deseret Mutual Customer Service Representatives. Terms to know found in other units should link to here for definitions. Each term should have its own row.*

**HOLE(S): CONTENT, POSSIBLE IMAGES**

*Content to be added by Deseret Mutual. Images representing or illustrating terms may be necessary.*

| IMAGE(S)                                      | AUDIO | LINKS | DIRECTIONS                                     |
|---|-------|-------|--|
| Images to illustrate terms to know as needed. |       |       | Click on a <a href="#">Link</a> to learn more. |

**CONTENT (APPEARS ON SCREEN):**

| Terms  | Definition (and Image as needed) |
|--------|----------------------------------|
| Term 1 | Definition 1                     |
| Term 2 | Definition 2                     |
| Term 3 | Definition 3                     |
| ...    | ...                              |
| Term n | Definition n                     |

**TOPIC:**  
**OBJECTIVE:**

| MATERIALS: | NUMBER OF PARTICIPANTS: | ESTIMATED DURATION: |
|------------|-------------------------|---------------------|
|            |                         |                     |

|                      |       |            |
|----------------------|-------|------------|
| INSTRUCTION          | TIME  | MATERIALS  |
|                      |       |            |
| DISCUSSION QUESTIONS | TIME  | MATERIALS  |
|                      |       |            |
| ACTIVITY             | TIME  | MATERIALS  |
|                      |       |            |
| INSTRUCTION          | TIME  | MATERIALS  |
|                      |       |            |
| DISCUSSION QUESTIONS | TIME  | MATERIALS  |
|                      |       |            |
| ACTIVITY             | TIME  | MATERIALS  |
|                      |       |            |
| INSTRUCTION          | TIME  | MATERIALS  |
|                      |       |            |
| DISCUSSION QUESTIONS | TIME: | MATERIALS: |



**Deseret Mutual Customer Service Training  
Instructor-led Training Template**

|                             |             |                  |
|-----------------------------|-------------|------------------|
|                             |             |                  |
| <b>ACTIVITY</b>             | <b>TIME</b> | <b>MATERIALS</b> |
|                             |             |                  |
| <b>INSTRUCTION</b>          | <b>TIME</b> | <b>MATERIALS</b> |
|                             |             |                  |
| <b>DISCUSSION QUESTIONS</b> | <b>TIME</b> | <b>MATERIALS</b> |
|                             |             |                  |
| <b>ACTIVITY</b>             | <b>TIME</b> | <b>MATERIALS</b> |
|                             |             |                  |
| <b>INSTRUCTION</b>          | <b>TIME</b> | <b>MATERIALS</b> |
|                             |             |                  |
| <b>DISCUSSION QUESTIONS</b> | <b>TIME</b> | <b>MATERIALS</b> |
|                             |             |                  |
| <b>ACTIVITY</b>             | <b>TIME</b> | <b>MATERIALS</b> |
|                             |             |                  |
| <b>INSTRUCTION</b>          | <b>TIME</b> | <b>MATERIALS</b> |
|                             |             |                  |

**ACTIVITY #**

**UNIT:**

**TOPIC:**

**OBJECTIVE:**

| DELIVERY METHOD | MATERIALS | NUMBER OF PARTICIPANTS | ESTIMATED DURATION |  |
|-----------------|-----------|------------------------|--------------------|--|
|                 |           |                        | Discussion:        |  |
|                 |           |                        | Set-up:            |  |
|                 |           |                        | Activity:          |  |
|                 |           |                        | Total:             |  |

**BREAKDOWN**

**GOAL:**

**INSTRUCTIONS:**

**QUESTIONS:**

**TIPS, SUGGESTIONS, OR SOLUTIONS:**

**NAME:**  
**TOPIC: CUSTOMERS**  
**UNIT: 1**

**REVIEW UNIT INFORMATION**

It's easy to see that at Deseret Mutual we have a diverse group of participants. It is important to know who you are dealing with and what you can do to meet their needs. Each customer has their own unique situation, but they can all display difficult behaviors. It is important to try and understand where a customer is coming from and then take one of many good steps toward helping solve their problems. Taking care of every participant allows Deseret Mutual to become the best benefits provider on the face of the earth, one customer at a time! Follow these key suggestions when dealing with your customers:

- Listen
- Remain calm
- Ask questions to understand your customer and their situation
- Care about your customers' needs
- Educate your customer about their policy and benefits, and what you can do to help them
- Treat your customers with respect

**WHAT HAVE YOU LEARNED IN THIS UNIT? PLEASE SHARE YOUR INSIGHTS BELOW.**

**NAME:**  
**TOPIC: A.C.E. EMPLOYEES**  
**UNIT: 2**

**REVIEW UNIT INFORMATION**

At Deseret Mutual you want to guarantee your customers' satisfaction. In order for that to happen, follow some of the tips we have discussed throughout this unit and start working towards using your attitude, confidence and empathy to become an ACE employee.

**You can develop and show a good customer service attitude by:**

- Caring about and focusing on your customer
- Asking questions to understand you customers' situation
- Evaluating the situation from a neutral angle
- Having patience
- Taking short breaks to calm down and focus and sharing your frustrations at appropriate times
- Listening to the whole story
- Treating the customer as you would want to be treated

**You can develop and show confidence by:**

- Emulating others
- Accepting help and feedback from others
- Preparing to accept failure because it will pave your way to success
- Speaking clearly
- Pausing and being assertive, but gentle in conversations
- Knowing what you're talking about, and if you don't, find out before telling your customer

**You can develop and show empathy by:**

- Thinking how you would react or feel in the situation
- Being emotionally aware and sensitive without becoming too emotionally involved
- Listening to what they are feeling as well as what they are saying
- Trying to understand your customers' feelings
- Sharing your similar experiences
- Staying calm and in control of the situation
- Being appropriate, respectful and sensitive to the topic

**WHAT HAVE YOU LEARNED IN THIS UNIT? PLEASE SHARE YOUR INSIGHTS BELOW.**

**NAME:**  
**TOPIC: BUILDING RELATIONSHIPS**  
**UNIT: 3**

**REVIEW UNIT INFORMATION**

Your customers will have a positive opinion of Deseret Mutual as you build lasting, individual relationships with them. They will be more likely to keep their business with Deseret Mutual because of your friendship with them. Remember to:

- Have a personal and professional relationship with your customers by communicating on the personal and professional levels
  - Begin your conversation on the personal level
  - Move between levels as appropriate
  - End your conversation on the personal level
- Strengthen relationships by acquiring and maintaining positive behaviors
  - Make recommendations
  - Show appreciation
  - Anticipate problems
  - Use easily understood language
  - Accept responsibility
  - Plan the future

**WHAT HAVE YOU LEARNED IN THIS UNIT? PLEASE SHARE YOUR INSIGHTS BELOW.**

**NAME:**  
**TOPIC: PROBLEM SOLVING**  
**UNIT: 4**

**REVIEW UNIT INFORMATION**

Problem solving a necessary component in high-quality customer service. Remember the following processes as you work with customers to solve their problems:

- Identify the problem
  - Connect with your customers
  - Listen and ask questions
  - Define the problem
- Identify all possible solutions
- Select the best solution for the customer
- Follow up

**WHAT HAVE YOU LEARNED IN THIS UNIT? PLEASE SHARE YOUR INSIGHTS BELOW.**

**NAME:**  
**TOPIC: EFFECTIVE LISTENING**  
**UNIT: 5**

**REVIEW UNIT INFORMATION**

Listening is an important skill to be developed in order to help our customers feel appreciated. Remember the following dos and don'ts of effective listening:

Do:

- Listen for central ideas by:
  - Concentrating on facts and feelings
  - Looking for physical and verbal cues
  - Understanding core issues
- Give the customer your total attention by:
  - Taking notes
  - Mentally summarizing or developing a picture
  - Analyzing
- Be actively involved by:
  - Echoing, commenting, and asking questions
  - Showing physical signs of involvement
- Maintain a neutral, open mind by:
  - Being objective
  - Allowing the customer to speak
- Clarify the message by:
  - Asking questions during pauses
  - Restating key points

Don't:

- Focus on facts alone
- Get hung up on delivery errors
- Be distracted
- Be passively involved
- Be too emotionally involved
- Judge prematurely
- Interrupt

**WHAT HAVE YOU LEARNED IN THIS UNIT? PLEASE SHARE YOUR INSIGHTS BELOW.**



**NAME:**  
**TOPIC: COMMUNICATING WELL**  
**UNIT: 6**

**REVIEW UNIT INFORMATION**

The ability to communicate effectively is important to all customer service representatives. As you continue to communicate with others, focus on the words you use and impressions you are leaving, both verbally and nonverbally.

Convey confidence by:

Avoiding

- Excuses
- Unnecessary details
- Blame
- Command statements
- Policy statements

Continuing to

- Smile
- Project energy and confidence
- Explain why
- Offer alternative solutions
- Think before you speak

**WHAT HAVE YOU LEARNED IN THIS UNIT? PLEASE SHARE YOUR INSIGHTS BELOW.**

**NAME:**  
**TOPIC: TELEPHONE TACTICS**  
**UNIT: 7**

**REVIEW UNIT INFORMATION**

When assisting customers via the telephone, remember to:

- Greet the customer
- Provide the customer with your department and name
- Personalize the conversation using customer's name
- Provide customers with feedback and an explanation of what you are doing
- Ask permission before transferring or placing on hold
- Provide any additional information customer may need
- Establish a time frame to complete any follow-up action

When using voicemail, include:

- Your name and department
- Whether or not you are in the office
- When you will be checking messages
- Who to contact in an emergency
- What information you need from customer

**WHAT HAVE YOU LEARNED IN THIS UNIT? PLEASE SHARE YOUR INSIGHTS BELOW.**

**NAME:**  
**TOPIC: WRITTEN CORRESPONDENCE**  
**UNIT: 8**

**REVIEW UNIT INFORMATION**

As you complete this unit, take a moment to review and reflect on the following concepts;

Written communications takes two forms:

- Letters
- Emails

When writing, you should:

- Know your customer
- Avoid jargon and acronyms
- Be brief
- Be professional
- Personalize
- Be clear

**WHAT HAVE YOU LEARNED IN THIS UNIT? PLEASE SHARE YOUR INSIGHTS BELOW.**



Appendix D

Master List



| Unit /Screen | Element       | Character(s)                              | Description  | Other  | Owner |
|--------------|---------------|---|--|--|-------|
| Global       | Photo         | Dan                                       | Photo of Dan, dressed in polo and khakis, smiling and happy  | Used on Screen 1 of each Unit                |       |
| Global       | Audio         | Dan                                       | Narration of on-screen content   | Used on Screen 1 of each Unit                |       |
| Global       | Graphic       | None                                      | Activity Icon  | Used to denote Activity screens in all units |       |
| Global       | Graphic       | None                                      | Review Icon  | Used to denote Review screens in all units   |       |
| Glossary     | Content       | None                                      | Terms to know and definitions  | Terms to know in all units are linked here   |       |
| Glossary     | Graphic/Photo | None                                      | Illustrations of terms to know as needed   |  |       |
| U0S2         | Audio         | Dan                                       | Narration of on-screen content   |  |       |
| U0S2         | Photo         | Dan                                       | Photo of Dan in a different pose than the first screen of this unit  |  |       |
| U0S2         | Photo         | Screen capture of a sample content screen | Sample screen includes links, pictures, forward arrow, directions on the bottom of the screen - all items are highlighted since they are talked about on this screen |  |       |
| U0S3         | Photo         | Dan                                       | Photo of Dan in a different pose than the first and second screen of this unit   |  |       |
| U0S3         | Audio         | Dan                                       | Narration of the first paragraph of on-screen content  |  |       |
| U1S2         | Content       | None                                      | Need a list of all the different customers (internal and external) that DMBA serves  |  |       |
| U1S3         | Graphic       | None                                      | Two hands shaking  |  |       |
| U1S4         | Photo         | student                                   | Photo of student participant, young male (18-24yrs) with book and a backpack   |  |       |
| U1S4         | Photo         | surviving spouse                          | Photo of a surviving spouse, single female (50-65yrs)  |  |       |

|       |         |                        |  |  |  |
|-------|---------|------------------------|--|--|--|
| U1S4  | Photo   | active employee        | Photo of an active employee, single man (30-45yrs)   |  |  |
| U1S4  | Photo   | 2 retiree participants | Photo of retiree participants, man and a woman (65+yrs)  |  |  |
| U1S4  | Photo   | disabled participant   | Photo of disabled participant, single woman (30-45yrs) in a wheelchair                             |  |  |
| U1S4  | Photo   | 2 DMBA employees       | Photo of internal customers, a man and a woman (20-45yrs) in Deseret Mutual shirts                 |  |  |
| U1S4  | Content | None                   | Review customer list and add additional customers to profile, if necessary                         |  |  |
| U1S4A | Photo   | student                | Use photo from U1S4  |  |  |
| U1S4A | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |  |  |
| U1S4B | Photo   | surviving spouse       | Use photo from U1S4  |  |  |
| U1S4B | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |  |  |
| U1S4C | Photo   | active employee        | Use photo from U1S4  |  |  |
| U1S4C | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |  |  |
| U1S4D | Photo   | 2 retiree participants | Use photo from U1S4  |  |  |
| U1S4D | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |  |  |
| U1S4E | Photo   | disabled participant   | Use photo from U1S4  |  |  |
| U1S4E | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |  |  |
| U1S4F | Photo   | 2 DMBA employees       | Use photo from U1S4  |  |  |



|       |         |                      |  |  |  |
|-------|---------|----------------------|--|--|--|
| U1S4F | Content | None                 | Add information to internal customers and make sure it is accurate and complete                            |  |  |
| U1S5  | Graphic | None                 | Collage of all the character graphics used in U15A-U15I, highly characterized and humorous                 |  |  |
| U1S5A | Graphic | Complaining customer | Graphic of man ranting   |  |  |
| U1S5A | Content | Complaining customer | Review the information for this participant and add or delete information and list of tips and suggestions |  |  |
| U1S5A | Content | None                 | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |  |
| U1S5B | Graphic | Aging customer       | Graphic of an old wrinkly lady   |  |  |
| U1S5B | Content | Aging customer       | Review the information for this participant and add or delete information and list of tips and suggestions |  |  |
| U1S5B | Content | None                 | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |  |
| U1S5C | Graphic | Angry customer       | Graphic of man growling  |  |  |
| U1S5C | Content | Angry customer       | Add information for this participant to the profile and list of tips and suggestions                       |  |  |
| U1S5C | Content | None                 | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |  |
| U1S5D | Graphic | Talkative customer   | Graphic of a lady talking into the phone (maybe 2 or 3 phones at one time)                                 |  |  |
| U1S5D | Content | Talkative customer   | Add information for this participant to the profile and list of tips and suggestions                       |  |  |

|       |         |   |  |  |  |
|-------|---------|---|--|--|--|
| U1S5D | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5E | Graphic | Demanding or abusive customer                     | Graphic of a man yelling (maybe with steam or fire coming out of his ears)           |  |  |
| U1S5E | Content | Demanding or abusive customer                     | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5E | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5F | Graphic | Flirty customer                                   | Graphic of a coy looking lady with big eyelashes                                     |  |  |
| U1S5F | Content | Flirty customer                                   | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5F | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5G | Graphic | Customer with heavy accent or poor English skills | Graphic of a man with foreign words coming out of his mouth                          |  |  |
| U1S5G | Content | Customer with heavy accent or poor English skills | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5G | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5H | Graphic | Quiet customer                                    | Graphic of a shy looking man with mouth zipped shut                                  |  |  |
| U1S5H | Content | Quiet customer                                    | Add information for this participant to the profile and list of tips and suggestions |  |  |

|         |         |                        |   |  |  |
|---------|---------|------------------------|---|--|--|
| U1S5H   | Content | None                   | Quote from DMBA employee who has dealt well with a customer with this behavior  |  |  |
| U1S5I   | Graphic | Argumentative customer | Graphic of an unhappy lady talking into the phone   |  |  |
| U1S5I   | Content | Argumentative customer | Add information for this participant to the profile and list of tips and suggestions                                    |  |  |
| U1S5I   | Content | None                   | Quote from DMBA employee who has dealt well with a customer with this behavior  |  |  |
| U2S2A-1 | Photo   | CSR1                   | Photo of CSR1 in work setting with a positive, happy, smiling   |  |  |
| U2S2A-1 | Photo   | CSR1                   | Photo of CSR1 in work setting with a negative, not happy, scowl   |  |  |
| U2S2A-1 | Audio   | CSR1/DMP1              | Conversation between CSR1 and DMP1 where DMP1 is asking a question and the CSR1 has a positive attitude when responding |  |  |
| U2S2A-1 | Audio   | CSR1/DMP1              | Conversation between CSR1 and DMP1 where DMP1 is asking a question and the CSR1 has a negative attitude when responding |  |  |
| U2S2A-2 | Photo   | CSR                    | Photo of CSR in work setting happy and smiling  |  |  |
| U2S2A-2 | Content | None                   | Quote from DMBA employee about how they work to have a good attitude even "bad" days                                    |  |  |
| U2S2B-1 | Photo   | CSR1                   | Photo of CSR1 in work setting physically showing confidence, shoulders up, smiling                                      |  |  |
| U2S2B-1 | Photo   | CSR1                   | Photo of CSR1 in work setting physically not confident, slumped, nervous  |  |  |

|         |         |           |   |  |  |
|---------|---------|-----------|---|--|--|
| U2S2B-1 | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 solves a problem with confidence  |  |  |
| U2S2B-1 | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 solves a problem without confidence   |  |  |
| U2S2B-2 | Photo   | CSR       | Photo of CSR in work setting confident and smiling  |  |  |
| U2S2B-2 | Content | None      | Quote from DMBA employee describing how confidence affects their work   |  |  |
| U2S2C-1 | Photo   | CSR1      | Photo of CSR1 in work setting physically attentive, concerned and pleasant  |  |  |
| U2S2C-1 | Photo   | CSR1      | Photo of CSR1 in work setting physically inattentive, not caring, and slightly annoyed  |  |  |
| U2S2C-1 | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 shows empathy   |  |  |
| U2S2C-1 | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 shows no empathy  |  |  |
| U2S2C-2 | Photo   | CSR       | Photo of CSR in work setting empathetic and smiling   |  |  |
| U2S2C-2 | Content | None      | Quote from DMBA employee describing how empathy helps them with customers   |  |  |
| U2S2D-1 | Photo   | DMP1      | Photo of DMP1 happy and smiling   |  |  |
| U2S2D-1 | Content | DMP1      | Quote from DMP1 talking about a good experience with a DM employee who had a positive attitude and/or showed confidence and/or demonstrated empathy |  |  |
| U2S2D-1 | Photo   | DMP2      | Photo of DMP2 happy and smiling   |  |  |

|         |         |           |   |  |  |
|---------|---------|-----------|---|--|--|
| U2S2D-1 | Content | DMP2      | Quote from DMP2 talking about a good experience with a DM employee who had a positive attitude and/or showed confidence and/or demonstrated empathy |  |  |
| U2S3    | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1, a poor phone call with certain items emphasized (see screen for items)  |  |  |
| U2S4    | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1, a good phone call with certain items emphasized (see screen for items)  |  |  |
| U3S3    | Graphic | None      | Chart of personal/professional levels (see screen for details)  |  |  |
| U3S4    | Graphic | None      | (see screen for details)  |  |  |
| U3S4    | Photo   | CSR1/DMP1 | Telephone conversation between CSR1 and DMP1  |  |  |
| U3S4    | Audio   | CSR1/DMP1 | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on professional level (see screen for details)                     |  |  |
| U3S5    | Graphic | None      | Use graphic from U3S4   |  |  |
| U3S5    | Photo   | CSR1/DMP1 | Use photo from U3S4   |  |  |
| U3S5    | Audio   | CSR1/DMP1 | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on personal level (see screen for details)                         |  |  |
| U3S6    | Photo   | CSR1/DMP1 | Use photo from U3S4   |  |  |
| U3S6    | Audio   | CSR1/DMP1 | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on personal level (see screen for details). Different than U3S5    |  |  |

|       |         |           |   |  |  |
|-------|---------|-----------|---|--|--|
| U3S6  | Graphic | None      | Use graphic from U3S4. Add clickable areas (see screen for details)   |  |  |
| U3S7  | Audio   | CSR1/DMP1 | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details)                       |  |  |
| U3S7  | Audio   | CSR2/DMP2 | Phone conversation between CSR2 and DMP2. Shows bad behaviors (see screen for details)                        |  |  |
| U3S7  | Photo   | CSR1/DMP1 | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details)                       |  |  |
| U3S7  | Photo   | CSR2/DMP2 | Phone conversation between CSR2 and DMP2. Shows bad behaviors (see screen for details)                        |  |  |
| U3S8  | Photo   | CSR1      | CSR1 on phone showing bad behaviors (see screen for details)  |  |  |
| U3S8  | Audio   | CSR1/DMP1 | Phone conversation between CSR1 and DMP1. Shows bad behaviors (see screen for details)                        |  |  |
| U3S9  | Photo   | CSR1      | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details). Different than U3S7. |  |  |
| U3S9  | Audio   | CSR1/DMP1 | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details). Different than U3S7. |  |  |
| U3S10 | Photo   | CSR1      | Head shot of CSR1 smiling (see screen for details)  |  |  |
| U3S10 | Photo   | CSR2      | Head shot of CSR2 smiling (see screen for details)  |  |  |
| U3S10 | Audio   | CSR1      | Success story of CSR1 building relationships  |  |  |
| U3S10 | Audio   | CSR2      | Success story of CSR2 building relationships  |  |  |

|      |         |           |   |  |  |
|------|---------|-----------|---|--|--|
| U4S3 | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 about DMP1's problem (see screen for details)                      |  |  |
| U4S3 | Photo   | CSR1/DMP1 | Face-to-face or phone conversation between CSR1 and DMP1.   |  |  |
| U4S3 | Content | None      | Update on-screen content according to nature of problem (see screen for details)                      |  |  |
| U4S4 | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 about DMP1's problem (see screen for details). Different than U4S3 |  |  |
| U4S4 | Photo   | CSR1/DMP1 | Use photo from U4S3   |  |  |
| U4S4 | Content | None      | Update on-screen content according to nature of problem (see screen for details)                      |  |  |
| U4S5 | Photo   | None      | Photo of policy manual (see screen for details)   |  |  |
| U4S5 | Content | None      | Content about sources of solutions to problems (see screen for details)                               |  |  |
| U4S6 | Content | None      | Content about criteria needed (see screen for details)  |  |  |
| U4S7 | Photo   | CSR1      | CSR1 selecting solution to problem from policy manual   |  |  |
| U4S7 | Audio   | CSR1      | Story from CSR1 about selecting solutions (see screen for details)                                    |  |  |
| U4S8 | Audio   | CSR1      | CSR1 discusses how to follow up   |  |  |
| U4S8 | Photo   | CSR1      | Photo of CSR1 on phone  |  |  |
| U4S8 | Content | None      | Need content about following up (see screen for details)  |  |  |
| U5S2 | Photo   | None      | Photo relevant to example (see screen for details)  |  |  |
| U5S2 | Content | None      | Example of why listening is important (see screen for details)  |  |  |
| U5S3 | Photo   | CSR1      | Head shot of CSR1 smiling (see screen for details)  |  |  |

|       |         |           |  |  |  |
|-------|---------|-----------|--|--|--|
| U5S3  | Content | CSR1      | Quote about listening (see screen for details)   |  |  |
| U5S4  | Photo   | CSR1      | Photo of CSR1 at desk, on phone daydreaming (see screen for details)   |  |  |
| U5S4  | Photo   | CSR2      | Photo of CSR2 at desk, on phone, focused on work (see screen for details)  |  |  |
| U5S4  | Audio   | CSR1/DMP1 | Phone call between CSR1 and DMP1. CSR1 is distracted (see screen for details)                                    |  |  |
| U5S4  | Audio   | CSR2/DMP2 | Phone call between CSR2 and DMP2. CSR2 effectively listens (see screen for details)                              |  |  |
| U5S4  | Content | None      | Summaries of examples (see screen for details)   |  |  |
| U5S6  | Photo   | CSR1      | CSR1 on phone  |  |  |
| U5S6  | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 (see screen for details)  |  |  |
| U5S7  | Photo   | CSR1      | CSR1 on phone  |  |  |
| U5S7  | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 (see screen for details). Different than U5S6                                 |  |  |
| U6S3  | Graphic | None      | Graphic containing the following words: Filler Words, Jargon, Negative Words, Exaggeration                       |  |  |
| U6S3B | Content | None      | Insert a list of DMBA specific jargon  |  |  |
| U6S4  | Photo   | CSR1      | Photo of CSR1, in work setting, on the telephone   |  |  |
| U6S4  | Audio   | CSR1      | "This is [name], how can I help you?" This should be recorded in seven different tones (see screen for details). |  |  |
| U6S5  | Photo   | CSR1      | CSR1 interacting (in person) with DMP1. CSR1 is not using good nonverbal techniques to communicate.              |  |  |



|       |         |           |  |  |  |
|-------|---------|-----------|--|--|--|
| U6S5  | Photo   | CSR2      | CSR2 interacting (in person) with DMP2. CSR2 is using good nonverbal techniques to communicate.              |  |  |
| U6S6  | Photo   | CSR1      | Use photo from U6S5  |  |  |
| U6S7  | Photo   | CSR1      | Photo of CSR1 in work setting, on the telephone, not smiling, no enthusiasm                                  |  |  |
| U6S7  | Photo   | CSR1      | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.  |  |  |
| U6S7  | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 is not enthusiastic, and there is no "smile" in his/her voice. |  |  |
| U6S7  | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 is enthusiastic, and there is a "smile" in his/her voice.      |  |  |
| U6S8  | Content | None      | Examples may need to be more DMBA specific.  |  |  |
| U6S9  | Content | None      | Examples may need to be more DMBA specific.  |  |  |
| U6S9  | Audio   | CSR1      | CSR1 "Is there anything I can help you with?" in two different tones. See screen for details.                |  |  |
| U6S10 | Photo   | CSR1      | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.  |  |  |
| U6S10 | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 uses several good communication techniques.                    |  |  |
| U6S11 | Photo   | CSR1      | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.  |  |  |

|       |         |           |   |  |  |
|-------|---------|-----------|---|--|--|
| U6S11 | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 uses several bad communication techniques.  |  |  |
| U7S2  | Photo   | CSR1      | Photo of CSR1 in work setting, on the telephone, pleasant and happy to be at work   |  |  |
| U7S2  | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 demonstrates each of guidelines listed on Screen 2  |  |  |
| U7S3  | Graphic | None      | Graphic of a telephone  |  |  |
| U7S3A | Graphic | None      | Graphic of a telephone being picked up  |  |  |
| U7S3B | Graphic | None      | Graphic of the "HOLD" button on the telephone   |  |  |
| U7S3B | Content | None      | Hold process may need to be customized to DMBA  |  |  |
| U7S3C | Graphic | None      | Graphic of multiple phones, with many arrows between/around them that represent calls being transferred   |  |  |
| U7S3C | Content | None      | Transfer process may need to be customized to DMBA  |  |  |
| U7S3C | Audio   | DMP1      | Testimonial of a good transfer experience   |  |  |
| U7S3D | Graphic | None      | Graphic of a telephone being hung up  |  |  |
| U7S4  | Graphic | None      | Graphic of a telephone with a flashing red voicemail light  |  |  |
| U7S7  | Photo   | CSR1      | Photo of CSR1 in work setting, answering the telephone  |  |  |
| U7S7  | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 is doing most the "right" things, calling customer by name, asking permission to transfer, listening, but not doing a "warm transfer" |  |  |

|      |         |      |  |  |  |
|------|---------|------|--|--|--|
| U8S2 | Content | None | Insert DMBA's letter writing policy/guidelines   |  |  |
| U8S2 | Graphic | None | Graphic of an email  |  |  |
| U8S2 | Graphic | None | Graphic of a letter  |  |  |
| U8S3 | Content | None | Insert more information about DMBA's letter writing policy   |  |  |
| U8S4 | Content | None | If this page is expanded to include examples, then more content will need to be developed. See screen for details. |  |  |
| U8S5 | Graphic | None | Graphic of a well written, professional, friendly letter   |  |  |
| U8S5 | Graphic | None | Graphic of a letter with lots of acronyms, rambling and confusing  |  |  |

| Unit /Screen | Element | Character(s) | Description   | Other  | Owner |
|--------------|---------|--------------|---|--|-------|
| Global       | Photo   | Dan          | Photo of Dan, dressed in polo and khakis, smiling and happy | Used on Screen 1 of each Unit                |       |
| Global       | Audio   | Dan          | Narration of on-screen content                              | Used on Screen 1 of each Unit                |       |
| Global       | Graphic | None         | Activity Icon   | Used to denote Activity screens in all units |       |
| Global       | Graphic | None         | Review Icon   | Used to denote Review screens in all units   |       |

| Unit /Screen | Element | Character(s)                              | Description  | Other | Owner |
|--------------|---------|---|--|-------|-------|
| U0S2         | Audio   | Dan                                       | Narration of on-screen content   |       |       |
| U0S2         | Photo   | Dan                                       | Photo of Dan in a different pose than the first screen of this unit  |       |       |
| U0S2         | Photo   | Screen capture of a sample content screen | Sample screen includes links, pictures, forward arrow, directions on the bottom of the screen - all items are highlighted since they are talked about on this screen |       |       |
| U0S3         | Photo   | Dan                                       | Photo of Dan in a different pose than the first and second screen of this unit   |       |       |
| U0S3         | Audio   | Dan                                       | Narration of the first paragraph of on-screen content  |       |       |

| Unit /Screen | Element | Character(s)           | Description  | Other | Owner |
|--------------|---------|------------------------|--|-------|-------|
| U1S2         | Content | None                   | Need a list of all the different customers (internal and external) that DMBA serves                |       |       |
| U1S3         | Graphic | None                   | Two hands shaking  |       |       |
| U1S4         | Photo   | student                | Photo of student participant, young male (18-24yrs) with book and a backpack                       |       |       |
| U1S4         | Photo   | surviving spouse       | Photo of a surviving spouse, single female (50-65yrs)  |       |       |
| U1S4         | Photo   | active employee        | Photo of an active employee, single man (30-45yrs)   |       |       |
| U1S4         | Photo   | 2 retiree participants | Photo of retiree participants, man and a woman (65+yrs)  |       |       |
| U1S4         | Photo   | disabled participant   | Photo of disabled participant, single woman (30-45yrs) in a wheelchair                             |       |       |
| U1S4         | Photo   | 2 DMBA employees       | Photo of internal customers, a man and a woman (20-45yrs) in Deseret Mutual shirts                 |       |       |
| U1S4         | Content | None                   | Review customer list and add additional customers to profile, if necessary                         |       |       |
| U1S4A        | Photo   | student                | Use photo from U2S4  |       |       |
| U1S4A        | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |       |       |
| U1S4B        | Photo   | surviving spouse       | Use photo from U2S4  |       |       |
| U1S4B        | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |       |       |
| U1S4C        | Photo   | active employee        | Use photo from U2S4  |       |       |
| U1S4C        | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |       |       |
| U1S4D        | Photo   | 2 retiree participants | Use photo from U2S4  |       |       |
| U1S4D        | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |       |       |
| U1S4E        | Photo   | disabled participant   | Use photo from U2S4  |       |       |
| U1S4E        | Content | None                   | Review information for this participant and add or delete to make sure it is accurate and complete |       |       |

|       |         |                               |  |  |  |
|-------|---------|-------------------------------|--|--|--|
| U1S4F | Photo   | 2 DMBA employees              | Use photo from U2S4  |  |  |
| U1S4F | Content | None                          | Add information to internal customers and make sure it is accurate and complete                            |  |  |
| U1S5  | Graphic | None                          | Collage of all the character graphics used in U25A-U25I, highly characterized and humorous                 |  |  |
| U1S5A | Graphic | Complaining customer          | Graphic of man ranting   |  |  |
| U1S5A | Content | Complaining customer          | Review the information for this participant and add or delete information and list of tips and suggestions |  |  |
| U1S5A | Content | None                          | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |  |
| U1S5B | Graphic | Aging customer                | Graphic of an old wrinkly lady   |  |  |
| U1S5B | Content | Aging customer                | Review the information for this participant and add or delete information and list of tips and suggestions |  |  |
| U1S5B | Content | None                          | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |  |
| U1S5C | Graphic | Angry customer                | Graphic of man growling  |  |  |
| U1S5C | Content | Angry customer                | Add information for this participant to the profile and list of tips and suggestions                       |  |  |
| U1S5C | Content | None                          | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |  |
| U1S5D | Graphic | Talkative customer            | Graphic of a lady talking into the phone (maybe 2 or 3 phones at one time)                                 |  |  |
| U1S5D | Content | Talkative customer            | Add information for this participant to the profile and list of tips and suggestions                       |  |  |
| U1S5D | Content | None                          | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |  |
| U1S5E | Graphic | Demanding or abusive customer | Graphic of a man yelling (maybe with steam or fire coming out of his ears)                                 |  |  |
| U1S5E | Content | Demanding or abusive customer | Add information for this participant to the profile and list of tips and suggestions                       |  |  |

|       |         |   |  |  |  |
|-------|---------|---|--|--|--|
| U1S5E | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5F | Graphic | Flirty customer                                   | Graphic of a coy looking lady with big eyelashes                                     |  |  |
| U1S5F | Content | Flirty customer                                   | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5F | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5G | Graphic | Customer with heavy accent or poor English skills | Graphic of a man with foreign words coming out of his mouth                          |  |  |
| U1S5G | Content | Customer with heavy accent or poor English skills | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5G | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5H | Graphic | Quiet customer                                    | Graphic of a shy looking man with mouth zipped shut                                  |  |  |
| U1S5H | Content | Quiet customer                                    | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5H | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5I | Graphic | Argumentative customer                            | Graphic of an unhappy lady talking into the phone                                    |  |  |
| U1S5I | Content | Argumentative customer                            | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5I | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |



| Unit /Screen | Element | Character(s) | Description   | Other | Owner |
|--------------|---------|--------------|---|-------|-------|
| U2S2A-1      | Photo   | CSR1         | Photo of CSR1 in work setting with a positive, happy, smiling   |       |       |
| U2S2A-1      | Photo   | CSR1         | Photo of CSR1 in work setting with a negative, not happy, scowl   |       |       |
| U2S2A-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where DMP1 is asking a question and the CSR1 has a positive attitude when responding |       |       |
| U2S2A-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where DMP1 is asking a question and the CSR1 has a negative attitude when responding |       |       |
| U2S2A-2      | Photo   | CSR          | Photo of CSR in work setting happy and smiling  |       |       |
| U2S2A-2      | Content | None         | Quote from DMBA employee about how they work to have a good attitude even "bad" days                                    |       |       |
| U2S2B-1      | Photo   | CSR1         | Photo of CSR1 in work setting physically showing confidence, shoulders up, smiling                                      |       |       |
| U2S2B-1      | Photo   | CSR1         | Photo of CSR1 in work setting physically not confident, slumped, nervous  |       |       |
| U2S2B-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 solves a problem with confidence  |       |       |
| U2S2B-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 solves a problem without confidence                                       |       |       |
| U2S2B-2      | Photo   | CSR          | Photo of CSR in work setting confident and smiling  |       |       |
| U2S2B-2      | Content | None         | Quote from DMBA employee describing how confidence affects their work   |       |       |
| U2S2C-1      | Photo   | CSR1         | Photo of CSR1 in work setting physically attentive, concerned and pleasant  |       |       |
| U2S2C-1      | Photo   | CSR1         | Photo of CSR1 in work setting physically inattentive, not caring, and slightly annoyed                                  |       |       |
| U2S2C-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 shows empathy   |       |       |
| U2S2C-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 shows no empathy  |       |       |
| U2S2C-2      | Photo   | CSR          | Photo of CSR in work setting empathetic and smiling   |       |       |
| U2S2C-2      | Content | None         | Quote from DMBA employee describing how empathy helps them with customers   |       |       |

|         |         |           |   |  |  |
|---------|---------|-----------|---|--|--|
| U2S2D-1 | Photo   | DMP1      | Photo of DMP1 happy and smiling   |  |  |
| U2S2D-1 | Content | DMP1      | Quote from DMP1 talking about a good experience with a DM employee who had a positive attitude and/or showed confidence and/or demonstrated empathy |  |  |
| U2S2D-1 | Photo   | DMP2      | Photo of DMP2 happy and smiling   |  |  |
| U2S2D-1 | Content | DMP2      | Quote from DMP2 talking about a good experience with a DM employee who had a positive attitude and/or showed confidence and/or demonstrated empathy |  |  |
| U2S3    | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1, a poor phone call with certain items emphasized (see screen for items)  |  |  |
| U2S4    | Audio   | CSR1/DMP1 | Conversation between CSR1 and DMP1, a good phone call with certain items emphasized (see screen for items)  |  |  |

| Unit /Screen | Element | Character(s) | Description  | Other | Owner |
|--------------|---------|--------------|--|-------|-------|
| U3S3         | Graphic | None         | Chart of personal/professional levels (see screen for details)   |       |       |
| U3S4         | Graphic | None         | (see screen for details)   |       |       |
| U3S4         | Photo   | CSR1/DMP1    | Telephone conversation between CSR1 and DMP1   |       |       |
| U3S4         | Audio   | CSR1/DMP1    | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on professional level (see screen for details)                  |       |       |
| U3S5         | Graphic | None         | Use graphic from U4S4  |       |       |
| U3S5         | Photo   | CSR1/DMP1    | Use photo from U4S4  |       |       |
| U3S5         | Audio   | CSR1/DMP1    | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on personal level (see screen for details)                      |       |       |
| U3S6         | Photo   | CSR1/DMP1    | Use photo from U4S4  |       |       |
| U3S6         | Audio   | CSR1/DMP1    | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on personal level (see screen for details). Different than U4S5 |       |       |
| U3S6         | Graphic | None         | Use graphic from U4S4. Add clickable areas (see screen for details)  |       |       |
| U3S7         | Audio   | CSR1/DMP1    | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details)  |       |       |
| U3S7         | Audio   | CSR2/DMP2    | Phone conversation between CSR2 and DMP2. Shows bad behaviors (see screen for details)   |       |       |
| U3S7         | Photo   | CSR1/DMP1    | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details)  |       |       |
| U3S7         | Photo   | CSR2/DMP2    | Phone conversation between CSR2 and DMP2. Shows bad behaviors (see screen for details)   |       |       |
| U3S8         | Photo   | CSR1         | CSR1 on phone showing bad behaviors (see screen for details)   |       |       |
| U3S8         | Audio   | CSR1/DMP1    | Phone conversation between CSR1 and DMP1. Shows bad behaviors (see screen for details)   |       |       |
| U3S9         | Photo   | CSR1         | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details). Different than U4S7.                                    |       |       |
| U3S9         | Audio   | CSR1/DMP1    | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details). Different than U4S7.                                    |       |       |

|       |       |      |  |  |  |
|-------|-------|------|--|--|--|
| U3S10 | Photo | CSR1 | Head shot of CSR1 smiling (see screen for details) |  |  |
| U3S10 | Photo | CSR2 | Head shot of CSR2 smiling (see screen for details) |  |  |
| U3S10 | Audio | CSR1 | Success story of CSR1 building relationships       |  |  |
| U3S10 | Audio | CSR2 | Success story of CSR2 building relationships       |  |  |

| Unit /Screen | Element | Character(s) | Description   | Other | Owner |
|--------------|---------|--------------|---|-------|-------|
| U4S3         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 about DMP1's problem (see screen for details)                      |       |       |
| U4S3         | Photo   | CSR1/DMP1    | Face-to-face or phone conversation between CSR1 and DMP1.   |       |       |
| U4S3         | Content | None         | Update on-screen content according to nature of problem (see screen for details)                      |       |       |
| U4S4         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 about DMP1's problem (see screen for details). Different than U5S3 |       |       |
| U4S4         | Photo   | CSR1/DMP1    | Use photo from U5S3   |       |       |
| U4S4         | Content | None         | Update on-screen content according to nature of problem (see screen for details)                      |       |       |
| U4S5         | Photo   | None         | Photo of policy manual (see screen for details)   |       |       |
| U4S5         | Content | None         | Content about sources of solutions to problems (see screen for details)                               |       |       |
| U4S6         | Content | None         | Content about criteria needed (see screen for details)  |       |       |
| U4S7         | Photo   | CSR1         | CSR1 selecting solution to problem from policy manual   |       |       |
| U4S7         | Audio   | CSR1         | Story from CSR1 about selecting solutions (see screen for details)                                    |       |       |
| U4S8         | Audio   | CSR1         | CSR1 discusses how to follow up   |       |       |
| U4S8         | Photo   | CSR1         | Photo of CSR1 on phone  |       |       |
| U4S8         | Content | None         | Need content about following up (see screen for details)  |       |       |

| Unit /Screen | Element | Character(s) | Description   | Other | Owner |
|--------------|---------|--------------|---|-------|-------|
| U5S2         | Photo   | None         | Photo relevant to example (see screen for details)                                  |       |       |
| U5S2         | Content | None         | Example of why listening is important (see screen for details)                      |       |       |
| U5S3         | Photo   | CSR1         | Head shot of CSR1 smiling (see screen for details)                                  |       |       |
| U5S3         | Content | CSR1         | Quote about listening (see screen for details)                                      |       |       |
| U5S4         | Photo   | CSR1         | Photo of CSR1 at desk, on phone daydreaming (see screen for details)                |       |       |
| U5S4         | Photo   | CSR2         | Photo of CSR2 at desk, on phone, focused on work (see screen for details)           |       |       |
| U5S4         | Audio   | CSR1/DMP1    | Phone call between CSR1 and DMP1. CSR1 is distracted (see screen for details)       |       |       |
| U5S4         | Audio   | CSR2/DMP2    | Phone call between CSR2 and DMP2. CSR2 effectively listens (see screen for details) |       |       |
| U5S4         | Content | None         | Summaries of examples (see screen for details)                                      |       |       |
| U5S6         | Photo   | CSR1         | CSR1 on phone   |       |       |
| U5S6         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 (see screen for details)                         |       |       |
| U5S7         | Photo   | CSR1         | CSR1 on phone   |       |       |
| U5S7         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 (see screen for details). Different than U6S6    |       |       |

| Unit /Screen | Element | Character(s) | Description  | Other | Owner |
|--------------|---------|--------------|--|-------|-------|
| U6S3         | Graphic | None         | Graphic containing the following words: Filler Words, Jargon, Negative Words, Exaggeration                       |       |       |
| U6S3B        | Content | None         | Insert a list of DMBA specific jargon  |       |       |
| U6S4         | Photo   | CSR1         | Photo of CSR1, in work setting, on the telephone   |       |       |
| U6S4         | Audio   | CSR1         | "This is [name], how can I help you?" This should be recorded in seven different tones (see screen for details). |       |       |
| U6S5         | Photo   | CSR1         | CSR1 interacting (in person) with DMP1. CSR1 is not using good nonverbal techniques to communicate.              |       |       |
| U6S5         | Photo   | CSR2         | CSR2 interacting (in person) with DMP2. CSR2 is using good nonverbal techniques to communicate.                  |       |       |
| U6S6         | Photo   | CSR1         | Use photo from U7S5  |       |       |
| U6S7         | Photo   | CSR1         | Photo of CSR1 in work setting, on the telephone, not smiling, no enthusiasm                                      |       |       |
| U6S7         | Photo   | CSR1         | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.  |       |       |
| U6S7         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 is not enthusiastic, and there is no "smile" in his/her voice.     |       |       |
| U6S7         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 is enthusiastic, and there is a "smile" in his/her voice.          |       |       |
| U6S8         | Content | None         | Examples may need to be more DMBA specific.  |       |       |
| U6S9         | Content | None         | Examples may need to be more DMBA specific.  |       |       |
| U6S9         | Audio   | CSR1         | CSR1 "Is there anything I can help you with?" in two different tones. See screen for details.                    |       |       |
| U6S10        | Photo   | CSR1         | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.  |       |       |
| U6S10        | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 uses several good communication techniques.                        |       |       |
| U6S11        | Photo   | CSR1         | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.  |       |       |
| U6S11        | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 uses several bad communication techniques.                         |       |       |

| Unit /Screen | Element | Character(s) | Description   | Other | Owner |
|--------------|---------|--------------|---|-------|-------|
| U7S2         | Photo   | CSR1         | Photo of CSR1 in work setting, on the telephone, pleasant and happy to be at work   |       |       |
| U7S2         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 demonstrates each of guidelines listed on Screen 2  |       |       |
| U7S3         | Graphic | None         | Graphic of a telephone  |       |       |
| U7S3A        | Graphic | None         | Graphic of a telephone being picked up  |       |       |
| U7S3B        | Graphic | None         | Graphic of the "HOLD" button on the telephone   |       |       |
| U7S3B        | Content | None         | Hold process may need to be customized to DMBA  |       |       |
| U7S3C        | Graphic | None         | Graphic of multiple phones, with many arrows between/around them that represent calls being transferred   |       |       |
| U7S3C        | Content | None         | Transfer process may need to be customized to DMBA  |       |       |
| U7S3C        | Audio   | DMP1         | Testimonial of a good transfer experience   |       |       |
| U7S3D        | Graphic | None         | Graphic of a telephone being hung up  |       |       |
| U7S4         | Graphic | None         | Graphic of a telephone with a flashing red voicemail light  |       |       |
| U7S7         | Photo   | CSR1         | Photo of CSR1 in work setting, answering the telephone  |       |       |
| U7S7         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 is doing most the "right" things, calling customer by name, asking permission to transfer, listening, but not doing a "warm transfer" |       |       |



| Unit /Screen | Element | Character(s) | Description  | Other | Owner |
|--------------|---------|--------------|--|-------|-------|
| U8S2         | Content | None         | Insert DMBA's letter writing policy/guidelines   |       |       |
| U8S2         | Graphic | None         | Graphic of an email  |       |       |
| U8S2         | Graphic | None         | Graphic of a letter  |       |       |
| U8S3         | Content | None         | Insert more information about DMBA's letter writing policy   |       |       |
| U8S4         | Content | None         | If this page is expanded to include examples, then more content will need to be developed. See screen for details. |       |       |
| U8S5         | Graphic | None         | Graphic of a well written, professional, friendly letter   |       |       |
| U8S5         | Graphic | None         | Graphic of a letter with lots of acronyms, rambling and confusing  |       |       |

| Unit /Screen | Element | Character(s)                                      | Description  | Other  | Owner |
|--------------|---------|---|--|--|-------|
| Global       | Graphic | None  | Activity Icon  | Used to denote Activity screens in all units |       |
| U1S3         | Graphic | None  | Two hands shaking  |  |       |
| U1S5         | Graphic | None  | Collage of all the character graphics used in U25A-U25I, highly characterized and humorous |  |       |
| U1S5A        | Graphic | Complaining customer                              | Graphic of man ranting   |  |       |
| U1S5B        | Graphic | Aging customer                                    | Graphic of an old wrinkly lady   |  |       |
| U1S5C        | Graphic | Angry customer                                    | Graphic of man growling  |  |       |
| U1S5D        | Graphic | Talkative customer                                | Graphic of a lady talking into the phone (maybe 2 or 3 phones at one time)                 |  |       |
| U1S5E        | Graphic | Demanding or abusive customer                     | Graphic of a man yelling (maybe with steam or fire coming out of his ears)                 |  |       |
| U1S5F        | Graphic | Flirty customer                                   | Graphic of a coy looking lady with big eyelashes   |  |       |
| U1S5G        | Graphic | Customer with heavy accent or poor English skills | Graphic of a man with foreign words coming out of his mouth                                |  |       |
| U1S5H        | Graphic | Quiet customer                                    | Graphic of a shy looking man with mouth zipped shut  |  |       |
| U1S5I        | Graphic | Argumentative customer                            | Graphic of an unhappy lady talking into the phone  |  |       |
| U3S3         | Graphic | None  | Chart of personal/professional levels (see screen for details)                             |  |       |
| U3S4         | Graphic | None  | (see screen for details)   |  |       |
| U3S5         | Graphic | None  | Use graphic from U4S4  |  |       |
| U3S6         | Graphic | None  | Use graphic from U4S4. Add clickable areas (see screen for details)                        |  |       |
| U6S3         | Graphic | None  | Graphic containing the following words: Filler Words, Jargon, Negative Words, Exaggeration |  |       |
| U7S3         | Graphic | None  | Graphic of a telephone   |  |       |
| U7S3A        | Graphic | None  | Graphic of a telephone being picked up   |  |       |

|          |               |      |   |  |  |
|----------|---------------|------|---|--|--|
| U7S3B    | Graphic       | None | Graphic of the "HOLD" button on the telephone   |  |  |
| U7S3C    | Graphic       | None | Graphic of multiple phones, with many arrows between/around them that represent calls being transferred |  |  |
| U7S3D    | Graphic       | None | Graphic of a telephone being hung up  |  |  |
| U7S4     | Graphic       | None | Graphic of a telephone with a flashing red voicemail light  |  |  |
| U8S2     | Graphic       | None | Graphic of an email   |  |  |
| U8S2     | Graphic       | None | Graphic of a letter   |  |  |
| U8S5     | Graphic       | None | Graphic of a well written, professional, friendly letter  |  |  |
| U8S5     | Graphic       | None | Graphic of a letter with lots of acronyms, rambling and confusing                                       |  |  |
| Global   | Graphic       | None | Review Icon   | Used to denote Review screens in all units |  |
| Glossary | Graphic/Photo | None | Illustrations of terms to know as needed  |  |  |

| Unit /Screen | Element | Character(s)                              | Description  | Other | Owner |
|--------------|---------|---|--|-------|-------|
| U0S2         | Photo   | Dan                                       | Photo of Dan in a different pose than the first screen of this unit  |       |       |
| U0S2         | Photo   | Screen capture of a sample content screen | Sample screen includes links, pictures, forward arrow, directions on the bottom of the screen - all items are highlighted since they are talked about on this screen |       |       |
| U0S3         | Photo   | Dan                                       | Photo of Dan in a different pose than the first and second screen of this unit   |       |       |
| U1S4         | Photo   | student                                   | Photo of student participant, young male (18-24yrs) with book and a backpack   |       |       |
| U1S4         | Photo   | surviving spouse                          | Photo of a surviving spouse, single female (50-65yrs)  |       |       |
| U1S4         | Photo   | active employee                           | Photo of an active employee, single man (30-45yrs)   |       |       |
| U1S4         | Photo   | 2 retiree participants                    | Photo of retiree participants, man and a woman (65+yrs)  |       |       |
| U1S4         | Photo   | disabled participant                      | Photo of disabled participant, single woman (30-45yrs) in a wheelchair   |       |       |
| U1S4         | Photo   | 2 DMBA employees                          | Photo of internal customers, a man and a woman (20-45yrs) in Deseret Mutual shirts   |       |       |
| U1S4A        | Photo   | student                                   | Use photo from U1S4  |       |       |
| U1S4B        | Photo   | surviving spouse                          | Use photo from U1S4  |       |       |
| U1S4C        | Photo   | active employee                           | Use photo from U1S4  |       |       |
| U1S4D        | Photo   | 2 retiree participants                    | Use photo from U1S4  |       |       |
| U1S4E        | Photo   | disabled participant                      | Use photo from U1S4  |       |       |
| U1S4F        | Photo   | 2 DMBA employees                          | Use photo from U1S4  |       |       |
| U2S2A-1      | Photo   | CSR1                                      | Photo of CSR1 in work setting with a positive, happy, smiling  |       |       |
| U2S2A-1      | Photo   | CSR1                                      | Photo of CSR1 in work setting with a negative, not happy, scowl  |       |       |
| U2S2A-2      | Photo   | CSR                                       | Photo of CSR in work setting happy and smiling   |       |       |
| U2S2B-1      | Photo   | CSR1                                      | Photo of CSR1 in work setting physically showing confidence, shoulders up, smiling   |       |       |
| U2S2B-1      | Photo   | CSR1                                      | Photo of CSR1 in work setting physically not confident, slumped, nervous   |       |       |
| U2S2B-2      | Photo   | CSR                                       | Photo of CSR in work setting confident and smiling   |       |       |

|         |       |           |   |  |  |
|---------|-------|-----------|---|--|--|
| U2S2C-1 | Photo | CSR1      | Photo of CSR1 in work setting physically attentive, concerned and pleasant                                    |  |  |
| U2S2C-1 | Photo | CSR1      | Photo of CSR1 in work setting physically inattentive, not caring, and slightly annoyed                        |  |  |
| U2S2C-2 | Photo | CSR       | Photo of CSR in work setting empathetic and smiling   |  |  |
| U2S2D-1 | Photo | DMP1      | Photo of DMP1 happy and smiling   |  |  |
| U2S2D-1 | Photo | DMP2      | Photo of DMP2 happy and smiling   |  |  |
| U3S10   | Photo | CSR1      | Head shot of CSR1 smiling (see screen for details)  |  |  |
| U3S10   | Photo | CSR2      | Head shot of CSR2 smiling (see screen for details)  |  |  |
| U3S4    | Photo | CSR1/DMP1 | Telephone conversation between CSR1 and DMP1  |  |  |
| U3S5    | Photo | CSR1/DMP1 | Use photo from U3S4   |  |  |
| U3S6    | Photo | CSR1/DMP1 | Use photo from U3S4   |  |  |
| U3S7    | Photo | CSR1/DMP1 | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details)                       |  |  |
| U3S7    | Photo | CSR2/DMP2 | Phone conversation between CSR2 and DMP2. Shows bad behaviors (see screen for details)                        |  |  |
| U3S8    | Photo | CSR1      | CSR1 on phone showing bad behaviors (see screen for details)  |  |  |
| U3S9    | Photo | CSR1      | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details). Different than U3S7. |  |  |
| U4S3    | Photo | CSR1/DMP1 | Face-to-face or phone conversation between CSR1 and DMP1.   |  |  |
| U4S4    | Photo | CSR1/DMP1 | Use photo from U4S3   |  |  |
| U4S5    | Photo | None      | Photo of policy manual (see screen for details)   |  |  |
| U4S7    | Photo | CSR1      | CSR1 selecting solution to problem from policy manual   |  |  |
| U4S8    | Photo | CSR1      | Photo of CSR1 on phone  |  |  |
| U5S2    | Photo | None      | Photo relevant to example (see screen for details)  |  |  |
| U5S3    | Photo | CSR1      | Head shot of CSR1 smiling (see screen for details)  |  |  |
| U5S4    | Photo | CSR1      | Photo of CSR1 at desk, on phone daydreaming (see screen for details)  |  |  |
| U5S4    | Photo | CSR2      | Photo of CSR2 at desk, on phone, focused on work (see screen for details)                                     |  |  |

|        |       |      |   |                               |  |
|--------|-------|------|---|-------------------------------|--|
| U5S6   | Photo | CSR1 | CSR1 on phone   |                               |  |
| U5S7   | Photo | CSR1 | CSR1 on phone   |                               |  |
| U6S10  | Photo | CSR1 | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.                               |                               |  |
| U6S11  | Photo | CSR1 | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.                               |                               |  |
| U6S4   | Photo | CSR1 | Photo of CSR1, in work setting, on the telephone  |                               |  |
| U6S5   | Photo | CSR1 | CSR1 interacting (in person) with DMP1. CSR1 is not using good nonverbal techniques to communicate. |                               |  |
| U6S5   | Photo | CSR2 | CSR2 interacting (in person) with DMP2. CSR2 is using good nonverbal techniques to communicate.     |                               |  |
| U6S6   | Photo | CSR1 | Use photo from U6S5   |                               |  |
| U6S7   | Photo | CSR1 | Photo of CSR1 in work setting, on the telephone, not smiling, no enthusiasm                         |                               |  |
| U6S7   | Photo | CSR1 | Photo of CSR1 in work setting, on the telephone, enthusiastic, happy.                               |                               |  |
| U7S2   | Photo | CSR1 | Photo of CSR1 in work setting, on the telephone, pleasant and happy to be at work                   |                               |  |
| U7S7   | Photo | CSR1 | Photo of CSR1 in work setting, answering the telephone  |                               |  |
| Global | Photo | Dan  | Photo of Dan, dressed in polo and khakis, smiling and happy   | Used on Screen 1 of each Unit |  |

| Unit /Screen | Element | Character(s) | Description   | Other                         | Owner |
|--------------|---------|--------------|---|-------------------------------|-------|
| Global       | Audio   | Dan          | Narration of on-screen content  | Used on Screen 1 of each Unit |       |
| U0S2         | Audio   | Dan          | Narration of on-screen content  |                               |       |
| U0S3         | Audio   | Dan          | Narration of the first paragraph of on-screen content   |                               |       |
| U2S2A-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where DMP1 is asking a question and the CSR1 has a positive attitude when responding         |                               |       |
| U2S2A-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where DMP1 is asking a question and the CSR1 has a negative attitude when responding         |                               |       |
| U2S2B-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 solves a problem with confidence  |                               |       |
| U2S2B-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 solves a problem without confidence   |                               |       |
| U2S2C-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 shows empathy   |                               |       |
| U2S2C-1      | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1 where CSR1 shows no empathy  |                               |       |
| U2S3         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1, a poor phone call with certain items emphasized (see screen for items)                      |                               |       |
| U2S4         | Audio   | CSR1/DMP1    | Conversation between CSR1 and DMP1, a good phone call with certain items emphasized (see screen for items)                      |                               |       |
| U3S10        | Audio   | CSR1         | Success story of CSR1 building relationships  |                               |       |
| U3S10        | Audio   | CSR2         | Success story of CSR2 building relationships  |                               |       |
| U3S4         | Audio   | CSR1/DMP1    | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on professional level (see screen for details) |                               |       |
| U3S5         | Audio   | CSR1/DMP1    | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on personal level (see screen for details)     |                               |       |

|       |       |           |  |  |  |
|-------|-------|-----------|--|--|--|
| U3S6  | Audio | CSR1/DMP1 | Telephone conversation between CSR1 and DMP1. CSR1 enters and exits conversation on personal level (see screen for details). Different than U3S5 |  |  |
| U3S7  | Audio | CSR1/DMP1 | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details)  |  |  |
| U3S7  | Audio | CSR2/DMP2 | Phone conversation between CSR2 and DMP2. Shows bad behaviors (see screen for details)   |  |  |
| U3S8  | Audio | CSR1/DMP1 | Phone conversation between CSR1 and DMP1. Shows bad behaviors (see screen for details)   |  |  |
| U3S9  | Audio | CSR1/DMP1 | Phone conversation between CSR1 and DMP1. Shows good behaviors (see screen for details). Different than U3S7.                                    |  |  |
| U4S3  | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 about DMP1's problem (see screen for details)   |  |  |
| U4S4  | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 about DMP1's problem (see screen for details). Different than U4S3  |  |  |
| U4S7  | Audio | CSR1      | Story from CSR1 about selecting solutions (see screen for details)   |  |  |
| U4S8  | Audio | CSR1      | CSR1 discusses how to follow up  |  |  |
| U5S4  | Audio | CSR1/DMP1 | Phone call between CSR1 and DMP1. CSR1 is distracted (see screen for details)  |  |  |
| U5S4  | Audio | CSR2/DMP2 | Phone call between CSR2 and DMP2. CSR2 effectively listens (see screen for details)  |  |  |
| U5S6  | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 (see screen for details)  |  |  |
| U5S7  | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 (see screen for details). Different than U5S6   |  |  |
| U6S10 | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 uses several good communication techniques.  |  |  |
| U6S11 | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 uses several bad communication techniques.   |  |  |
| U6S4  | Audio | CSR1      | "This is [name], how can I help you?" This should be recorded in seven different tones (see screen for details).                                 |  |  |



|       |       |           |   |  |  |
|-------|-------|-----------|---|--|--|
| U6S7  | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 is not enthusiastic, and there is no "smile" in his/her voice.  |  |  |
| U6S7  | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 is enthusiastic, and there is a "smile" in his/her voice.   |  |  |
| U6S9  | Audio | CSR1      | CSR1 "Is there anything I can help you with?" in two different tones. See screen for details.   |  |  |
| U7S2  | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 demonstrates each of guidelines listed on Screen 2  |  |  |
| U7S3C | Audio | DMP1      | Testimonial of a good transfer experience   |  |  |
| U7S7  | Audio | CSR1/DMP1 | Conversation between CSR1 and DMP1 where CSR1 is doing most the "right" things, calling customer by name, asking permission to transfer, listening, but not doing a "warm transfer" |  |  |

**Deseret Mutual Customer Service Training  
Telephone Tactics Prototype**

| Unit /Screen | Element | Character(s)         | Description  | Other                                      | Owner |
|--------------|---------|----------------------|--|--|-------|
| Glossary     | Content | None                 | Terms to know and definitions  | Terms to know in all units are linked here |       |
| U1S2         | Content | None                 | Need a list of all the different customers (internal and external) that DMBA serves                        |  |       |
| U1S4         | Content | None                 | Review customer list and add additional customers to profile, if necessary                                 |  |       |
| U1S4A        | Content | None                 | Review information for this participant and add or delete to make sure it is accurate and complete         |  |       |
| U1S4B        | Content | None                 | Review information for this participant and add or delete to make sure it is accurate and complete         |  |       |
| U1S4C        | Content | None                 | Review information for this participant and add or delete to make sure it is accurate and complete         |  |       |
| U1S4D        | Content | None                 | Review information for this participant and add or delete to make sure it is accurate and complete         |  |       |
| U1S4E        | Content | None                 | Review information for this participant and add or delete to make sure it is accurate and complete         |  |       |
| U1S4F        | Content | None                 | Add information to internal customers and make sure it is accurate and complete                            |  |       |
| U1S5A        | Content | Complaining customer | Review the information for this participant and add or delete information and list of tips and suggestions |  |       |
| U1S5A        | Content | None                 | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |       |
| U1S5B        | Content | Aging customer       | Review the information for this participant and add or delete information and list of tips and suggestions |  |       |
| U1S5B        | Content | None                 | Quote from DMBA employee who has dealt well with a customer with this behavior                             |  |       |

**Deseret Mutual Customer Service Training  
Telephone Tactics Prototype**

|         |         |   |  |  |  |
|---------|---------|---|--|--|--|
| U1S5C   | Content | Angry customer                                    | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5C   | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5D   | Content | Talkative customer                                | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5D   | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5E   | Content | Demanding or abusive customer                     | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5E   | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5F   | Content | Flirty customer                                   | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5F   | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5G   | Content | Customer with heavy accent or poor English skills | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5G   | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5H   | Content | Quiet customer                                    | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5H   | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U1S5I   | Content | Argumentative customer                            | Add information for this participant to the profile and list of tips and suggestions |  |  |
| U1S5I   | Content | None  | Quote from DMBA employee who has dealt well with a customer with this behavior       |  |  |
| U2S2A-2 | Content | None  | Quote from DMBA employee about how they work to have a good attitude even "bad" days |  |  |
| U2S2B-2 | Content | None  | Quote from DMBA employee describing how confidence affects their work                |  |  |
| U2S2C-2 | Content | None  | Quote from DMBA employee describing how empathy helps them with customers            |  |  |


**Deseret Mutual Customer Service Training  
Telephone Tactics Prototype**

|         |         |      |   |  |  |
|---------|---------|------|---|--|--|
| U2S2D-1 | Content | DMP1 | Quote from DMP1 talking about a good experience with a DM employee who had a positive attitude and/or showed confidence and/or demonstrated empathy |  |  |
| U2S2D-1 | Content | DMP2 | Quote from DMP2 talking about a good experience with a DM employee who had a positive attitude and/or showed confidence and/or demonstrated empathy |  |  |
| U4S3    | Content | None | Update on-screen content according to nature of problem (see screen for details)  |  |  |
| U4S4    | Content | None | Update on-screen content according to nature of problem (see screen for details)  |  |  |
| U4S5    | Content | None | Content about sources of solutions to problems (see screen for details)   |  |  |
| U4S6    | Content | None | Content about criteria needed (see screen for details)  |  |  |
| U4S8    | Content | None | Need content about following up (see screen for details)  |  |  |
| U5S2    | Content | None | Example of why listening is important (see screen for details)  |  |  |
| U5S3    | Content | CSR1 | Quote about listening (see screen for details)  |  |  |
| U5S4    | Content | None | Summaries of examples (see screen for details)  |  |  |
| U6S3B   | Content | None | Insert a list of DMBA specific jargon   |  |  |
| U6S8    | Content | None | Examples may need to be more DMBA specific.   |  |  |
| U6S9    | Content | None | Examples may need to be more DMBA specific.   |  |  |
| U7S3B   | Content | None | Hold process may need to be customized to DMBA  |  |  |
| U7S3C   | Content | None | Transfer process may need to be customized to DMBA  |  |  |
| U8S2    | Content | None | Insert DMBA's letter writing policy/guidelines  |  |  |
| U8S3    | Content | None | Insert more information about DMBA's letter writing policy  |  |  |
| U8S4    | Content | None | If this page is expanded to include examples, then more content will need to be developed. See screen for details.                                  |  |  |

## Appendix E


### Prototype of Telephone Tactics Unit






## Unit 8: Telephone Tactics

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At Deseret Mutual, our customers place a great deal of emphasis on the service they receive from us. When they have a positive experience here, they are more likely to return and look forward to doing business with us again.

As customer service representatives for Deseret Mutual, we are in charge of making sure that our customers have a positive experience with Deseret Mutual, a **WOW experience** that causes them to return again and again.

In many instances, our only interaction with customers may be over the telephone. For this reason, it is extremely important that our telephone interaction be positive and professional.

This unit presents overall guidelines and specific techniques that will assist you in making each customer's telephone exchange with Deseret Mutual a positive one.

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### Overall Guidelines

Customers base their perceptions of you (and ultimately of Deseret Mutual) on your tone of voice and the manner in which you facilitate the phone call, as well as the words you use. To make a positive impression it is important that you project a positive and friendly manner. To help you achieve this, we recommend the following guidelines:

**Personalize the conversation by using your customer's name.** Doing so will help you establish a rapport with your customers, and help them build a positive relationship with you.

**Give your customers feedback.** Help them to know and understand what you are doing, and what progress you are making towards solving their problem. If, for example, you are waiting for your computer to process customer information, let your customer know that you have entered the information, and are waiting for it to be processed.

**Give your customers your full attention, take an interest in them.** Don't be nosy, but when they do volunteer information, acknowledge that


  
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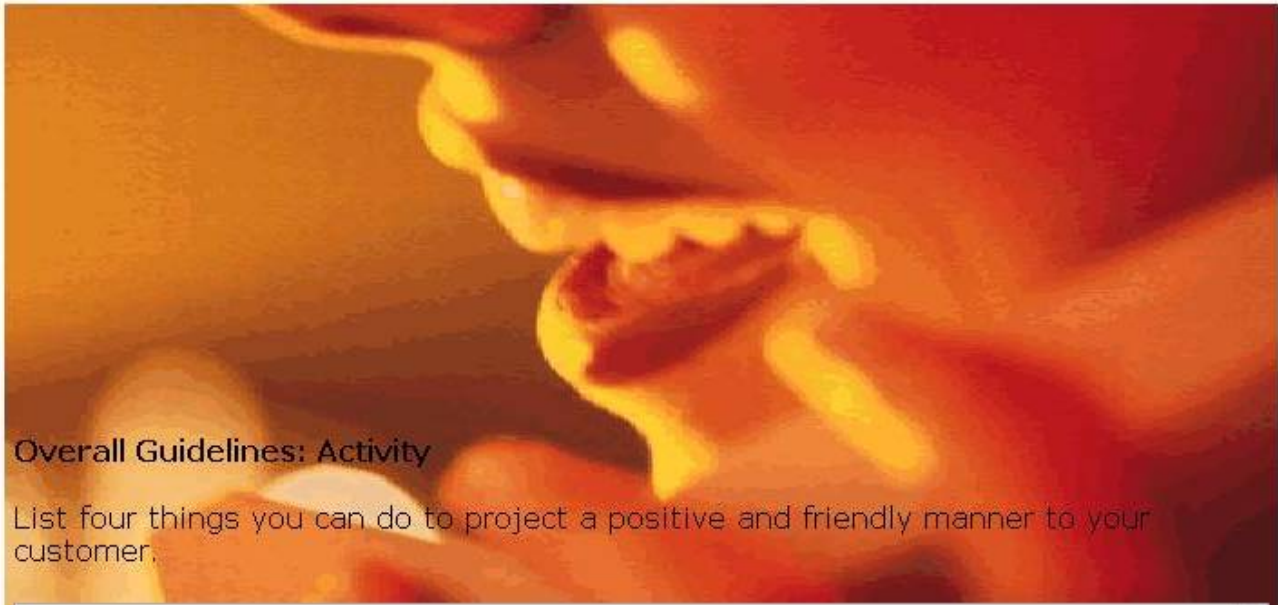
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### Overall Guidelines: Activity


List four things you can do to project a positive and friendly manner to your customer.

Submit

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## Unit 8: Telephone Tactics

### Phases of Telephone Calls

Now that we've discussed some overall guidelines, let's get into the specifics of the actual telephone experience.

There are typically four phases within a telephone call. Not all calls will contain every phase, but some will. Select each phase to learn about it in more detail.

These include:

[Answering the Call](#)

[Placing Your Customer on Hold](#)

[Transferring Your Customer](#)

[Closing the Call](#)



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### Phases of Telephone Calls:

#### Answering the Call

Remember the last time you called a customer service hotline? How many times did the telephone ring before you picked it up? How did that make your feel?

As a customer service representative, it is very important that you answer the telephone quickly, within 2-3 rings. Allowing the telephone to continue ringing signals to your customers that their calls are not very important to you.

When you answer the telephone, it is important to greet the customer, identify yourself by name and department, and offer to assist them. Including these elements in your greeting gives customers a reassurance that they have called the right place, helps them relax and lets them know that you are ready and willing to assist them.

*When answering the telephone, remember to:*

1. Greet the caller
2. Give the name of your department
3. State your name
4. Offer assistance

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### Phases of Telephone Calls:

#### Placing Your Customer on Hold

Placing customers on hold should be done only when necessary, such as when you have to physically leave your desk or telephone to get information, or when another urgent call is coming through. If you have to leave your customers for any reason, be sure to place them on hold. You never know what background noises and events customers might hear while you're gone.

When putting customers on hold, always explain why you are going to do so. Ask permission to place them on hold, give them a chance to respond, and honor their request. If your customer is unwilling or unable to hold, do what you can to assist them then and there.


When you do place customers on hold, if the problem cannot be solved in a reasonable amount of time, get their contact information and offer to call them back within a specified timeframe. Most customers do not like to be kept waiting for more than a minute.

#### When placing a customer on hold:

1. Explain why you are placing them on hold.
2. Ask permission to place them on hold.
3. Allow them to respond and honor their request.
4. Offer to call back if necessary.

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*When transferring a customer:*

1. Explain what you are doing and why.
2. Ask permission to transfer the call.
3. Determine if third party is the correct person to take the call.
4. Brief the third party on the situation.
5. Introduce the customer and the third party.

Phases of Telephone Calls:

### Transferring Your Customer

There is nothing more frustrating to customers than being passed around to three different people before finding the “right” one to resolve their concerns. As a customer service representative, you can’t guarantee that a customer will contact the right person in the right department, but when they don’t you can make their life (and yours!) a lot easier by helping them efficiently find the right person.

When it becomes necessary to transfer a customer, there are several steps to keep in mind. Explain to your customer why you would like to transfer them, then ask your customer permission to transfer them. This allows the customer to maintain a feeling of control in the situation.

Always bring the third party on the line, and determine if they are the correct person to take the call. Not only will your customer appreciate this, you will appreciate it as well when other customer service representatives return the favor! When you bring the third party on the line.

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### Phases of Telephone Calls:

#### Closing the Call

As the call comes to a close, it is your responsibility to make sure that it ends on a positive note, that your customer is satisfied, and that your customer knows what to expect in the future.

Before ending the call, verify with your customers that all their questions and concerns have been addressed. If any of their concerns or problems are still unresolved, establish a plan of action to resolve them. As part of that plan, establish a timeframe for resolving concerns and decide how to communicate with your customer going forward. And finally, provide your customer with any additional information they may need, such as a telephone number where you can be reached in the future.


#### *When closing the call:*

1. Verify with the customer that all their questions and concerns have been addressed.
2. List any further actions that need to be taken.
3. Establish a timeframe for those actions to be completed.
4. Provide the customer with any additional information they may need (including a way to contact you again).

*Unit 8: Telephone Tactics*

**Phases of Telephone Calls: Activity**

1- What steps should you follow when transferring a customer?



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### Using Voicemail

There may be times when a customer needs to get information to you, but is unable to reach you directly. When this happens, customers are usually directed to your voicemail. With voicemail, as with all your customer interactions, you want your customers to leave having had a positive experience. The way you handle and respond to your voicemail can have a significant impact on your customers' impressions and experiences with Deseret Mutual.

You should provide your customers with an accurate, up-to-date voicemail message. The message should let your customers know who you are, and what department you represent. You should also make them aware of where you are and when you'll be back. Answer their questions, such as: Are you in the office? Out of the office? Are you checking your messages? How often? Who can they contact in case of an emergency? What kind of information should they leave for you? Having access to this information allows customers to once again feel in control of the situation. If they know you aren't in the office, they have the option of either leaving you a message (knowing you won't get back to them for

**Let your customers know:**

- Your name and what department you represent.
- Whether or not you are in the office.
- When you will be checking messages.
- Who to contact in an emergency.
- What kind of information they should leave for you (phone number, name, date, time, etc.).



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### Using Voicemail: Activity


What kinds of information should be recorded on your voice mail message? Check all that apply.

- ? When you will be checking messages
- ? Who you went to lunch with
- ? How long you will be gone
- ? Where you are
- ? Whether you are in or out of the office
- ? Who to contact in case of an emergency
- ? Your home phone number

Submit

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[Click here to listen to the example]

PLAY / STOP

### Telephone Tactics: Activity

1- What did this customer service representative do well?

Submit

2- Could this call be improved? How?


Submit

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### Review

When assisting customers via the telephone, remember to:

- Greet the customer
- Provide the customer with your department and name
- Personalize the conversation using customer's name
- Provide customers with feedback and an explanation of what you are doing
- Ask permission before transferring or placing on hold
- Provide any additional information customer may need
- Establish a time frame to complete any follow-up action

When using voicemail, include:

- Your name and department
- Whether or not you are in the office
- When you will be checking messages
- Who to contact in an emergency
- What information you need from customer



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*Thank you. Please select another Unit from the left side to continue...*

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