

Building Better Customer Relationships

Producer: Pre-work	<ul style="list-style-type: none"> ● A breakout room activity is scheduled for this session on slides 19, 22, and 25. Collaborate with the facilitator to decide if participants should be put into specific groups or if the groups can be chosen at random. There will be 5 groups of 4 participants in different rooms. These groups should remain the same throughout all three breakout rooms.
	<ul style="list-style-type: none"> ● You will assign people numbers as they enter the Zoom. Send them a direct message with their number on it. ● There is a jamboard on slide 10. The same jamboard is on slide 15. You will need to put the link in the chat. ● There is a Kahoot that you will need to show on slide 26. This will be presented in Classic mode so the facilitator will control and lead it. The screen will need to be shown the whole time.

Facilitator Pre-Work:	<ul style="list-style-type: none"> ● This guide was developed for the purpose of delivering this course via Zoom. It could be used as classroom training with the following considerations. <ul style="list-style-type: none"> ○ Breakout room activities need to be small group activities.
	<ul style="list-style-type: none"> ● There are 3 breakout room sessions. Each group will have four members. Collaborate with the producer about whether you feel those groups should be formed a certain way or if the Producer can make them random. The groups should remain the same for all three break-out sessions.
	<ul style="list-style-type: none"> ● Open the PowerPoint associated with this guide.
	<ul style="list-style-type: none"> ● You will need to share your screen for many parts of the training. There will be some times that you will not be sharing your screen. Those are noted in the slideshow as well as the guide.
	<ul style="list-style-type: none"> ● Some key talking points and questions are included in this guide but be prepared to add your own commentary and questions as well.

Building Better Customer Relationships

	<ul style="list-style-type: none"> Aim towards generating a response from the learners at least once every five minutes; this will keep the learners engaged and will encourage them to follow along closely.
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Session # 1		
Slides	Approximate Timing	Topic
1-8	8 min.	Introduction
9-15	19 min.	Why building relationships is important
16-25	25 min.	Ways to build relationships
26-27	9 min.	Review and closing
Total:	60 min.	

Slide#) Duration	Slide	Facilitator Notes	Producer Notes
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Building Better Customer Relationships

2) 2 min.



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Welcome

- As you come in please make sure your name is on your screen.
- You will be sent a private message in the text with a number. Please put that number in your name as well.
- Once you have done this put an emoji in the chat of how you are feeling today.
- Make yourself comfortable.

This slide will be up as people are coming in before the session actually starts. This time doesn't count towards the seat time.

[This is the entrance slide, so you will be welcoming people as they come in. You will repeat parts of this as more people enter]




Say: Welcome everyone. As you enter if you will just read the screen there are some directions on what to do. Please put your name and your preferred pronouns if you would like. You will be getting a direct message with a number to add to your name on your screen. Please get a cup of coffee or tea and a comfortable spot while we are waiting for everyone to join. We will start at [enter start time] **[Repeat this as more people enter, approximately every 2 minutes.]**

Do: Stop screensharing so everyone can see you as you welcome then.





Say: Hello everyone. Welcome to Building Better Customer Relationships. I am so glad you all are here. I want to respect your time so as I see it is [enter time] we will go ahead and get started. If you haven't already if you will please look in the chat screen. Our producer has sent you a number. If you will add that number to your screen name. We will use this today for some activities. A little bit about myself.

Producer: As the learners are coming in send them a number in a private message.
Advance slide

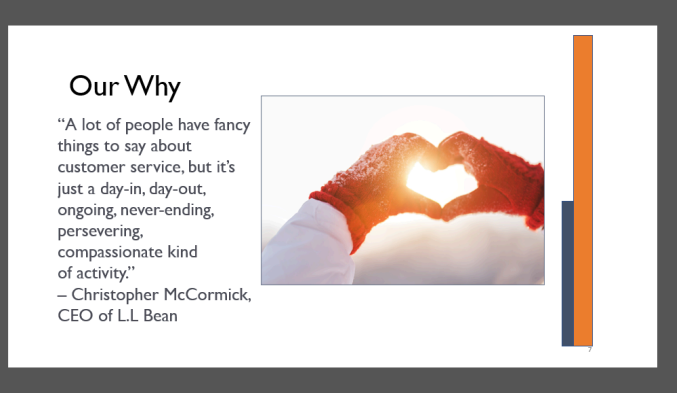
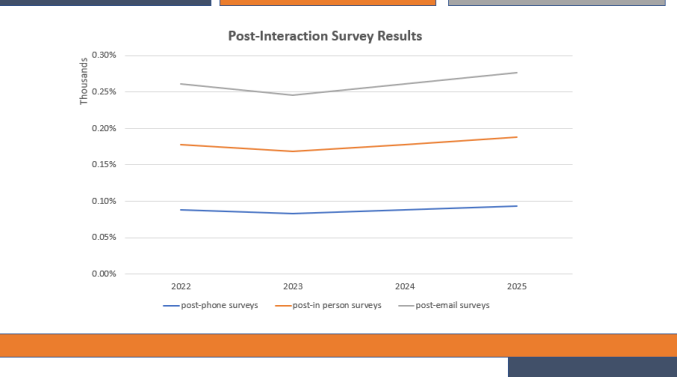
Building Better Customer Relationships

<p>3) 2 min.</p>	<div data-bbox="289 191 982 594"> <div data-bbox="289 237 445 269">About Me</div> <ul data-bbox="289 279 550 334" style="list-style-type: none"> • I am [insert info to share] • [write what your position is] <div data-bbox="680 246 898 393">  </div> <div data-bbox="659 415 877 561">  </div> </div>	<p>This slide will need to be edited by the presenter to personalize the training. Say: The information you want to share. Also have the producer share. Advance Slide</p>	
<p>4) 1 min.</p>	<div data-bbox="382 652 903 1016">  </div>	<p>Do: Read the agenda on the slide. Say: Let's do a quick ice breaker before we get started. We are going to do a quick Would you rather. I will show you the image. You choose which one you would rather have or do and type it into the box. Then I will use your number that you were given when you came in to call on someone. Any questions? Ok here we go. Advance slide</p>	<p>—</p>


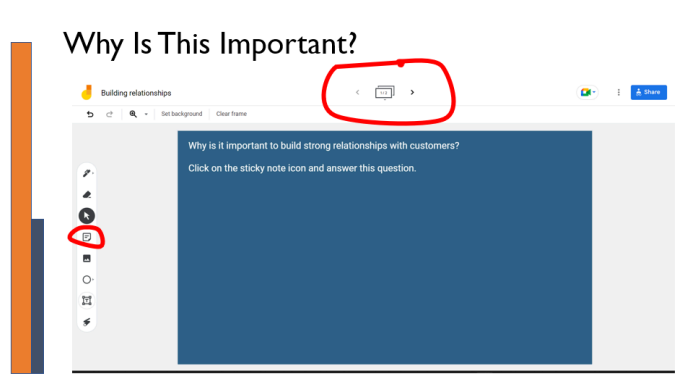
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<p>5) 30 sec.</p>	<p>Would you rather?</p> <div> <div>1</div>  </div> <div> <div>2</div>  </div>	<p>Do: Click to make each choice appear. Ask for volunteers or choose a number.</p> <p>Say: Would you rather, go to the mountains or go to the beach? Put your answer number in the chat. When you share tell us which one you would choose and why.</p> <p>Advance slide</p>	
<p>6) 30 sec</p>	<p>Would you rather?</p> <div> <div>1</div>  </div> <div> <div>2</div>  </div>	<p>Do: Click to make each choice appear.</p> <p>Say: Would you rather, eat ice cream or drink a milkshake? Put your answer number in the chat. When you share tell us which one you would choose and why.</p> <p>Let's switch gears before we all get too hungry.</p> <p>Advance Slide</p>	


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<p>7) 1 min.</p>	 <p>Our Why</p> <p>"A lot of people have fancy things to say about customer service, but it's just a day-in, day-out, ongoing, never-ending, persevering, compassionate kind of activity."</p> <p>— Christopher McCormick, CEO of L.L. Bean</p>	<p>Do: Read the quote on the slide.</p> <p>Say: This is our why. It customer relationships are the backbone to our company. If we aren't doing well with our relationships then we aren't doing well as a company.</p> <p>Advance slide</p>																					
<p>8) 1 min</p>	 <p>Post-Interaction Survey Results</p> <table border="1"> <thead> <tr> <th>Year</th> <th>post-phone surveys (Thousands)</th> <th>post-in person surveys (Thousands)</th> <th>post-email surveys (Thousands)</th> </tr> </thead> <tbody> <tr> <td>2022</td> <td>0.08</td> <td>0.18</td> <td>0.26</td> </tr> <tr> <td>2023</td> <td>0.07</td> <td>0.17</td> <td>0.24</td> </tr> <tr> <td>2024</td> <td>0.08</td> <td>0.18</td> <td>0.26</td> </tr> <tr> <td>2025</td> <td>0.09</td> <td>0.19</td> <td>0.28</td> </tr> </tbody> </table>	Year	post-phone surveys (Thousands)	post-in person surveys (Thousands)	post-email surveys (Thousands)	2022	0.08	0.18	0.26	2023	0.07	0.17	0.24	2024	0.08	0.18	0.26	2025	0.09	0.19	0.28	<p>Say: Over the last year, we have seen our customer service rating drop 5% based on post-interaction surveys. Our customers do not feel connected to us, or feel we care as much about them as they used to.</p> <p>We want to increase our customer service rating by 10% over the next to years, which will allow us to surpass where we were. This is why we are here today to talk about how we can build better customer relationships. Let's see what our learning goals will be.</p> <p>Advance Slide</p>	
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<p>9) 2 min.</p>		<p>Say: Today we are going to be talking about how we can build better customer relationships with our customers. Our goals today are.</p> <p>Do: Click to reveal each objective. Read each objective as they appear.</p> <p>Advance slide</p>	
<p>10) 6 min.</p>		<p>Say: Before we start looking at why it's so important to build good customer relationships let's see where your thinking is on this right now. We are going to go to a Jamboard. If you haven't ever been to Jamboard before it's just a wall to put sticky notes on. You will click on the link we are getting ready to post in the chat. Then look at the top and make sure you are on slide one. As we move on and use this again you will need to click to the second slide. Then click to get a sticky note. On your sticky note write why you think it is important for businesses to have strong relationships with their customers.</p> <p>Do: Click to make the jamboard come up Click to draw a circle around the top of the jamboard picture explaining which slide to be on. Also, click to draw the circle to show where the sticky notes are.</p>	<p>Producer notes: Put the link to the jamboard in the chat when the presenter talks about it.</p> <p>https://jamboard.google.com/d/1QAnLdxXvdgXUVDZY3jSDF7kfvRp76Jck1hOOfS42y5s/edit?usp=sharing</p> <p>Leave screenshare of jamboard and advance slide</p>

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		<p>[While looking at the Jamboard]</p> <p>Do: Switch to screenshare the jamboard and call on 1-3 people depending on time to share why they thought building relationships was important.</p> <p>Give everyone 1 minute to read through what was written.</p> <p>Wait 30 seconds after asking if anyone wants to share if no one does just randomly choose a number and call it out.</p> <p>Say: Take one minute to read over everyone's sticky notes.</p> <p>Do I have anyone who wants to share what they wrote, or comment on what someone else wrote?</p> <p>Now keeping all these great ideas in mind let's look at three main reasons why building good customer relationships is so important.</p>	
11) 1 min.		<p>Say: The first reason is building good customer relationships is so important is that good customer relationships increases customer retention.</p> <p>Do click to reveal customer retention.</p> <p>Advance slide</p>	

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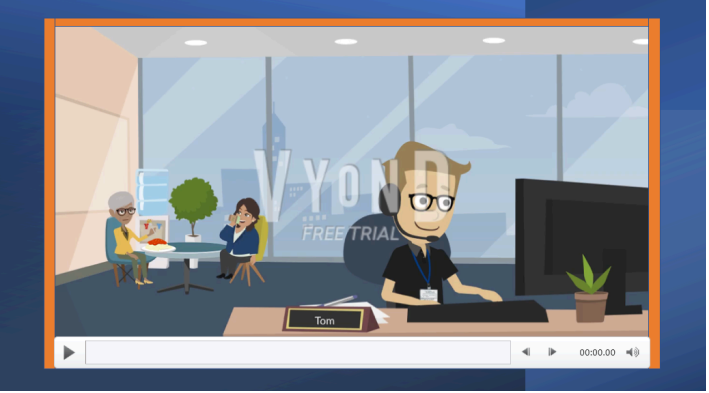
12) 1 min.	<div data-bbox="325 203 535 576"> <p>Increase Customer Retention</p> <p>New Item Sales</p>  <p>previous customers new customers</p> <p>■ Sales</p> </div> <div data-bbox="535 203 745 576">  </div> <div data-bbox="745 203 955 576">  </div>
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14) 2 min.	<div data-bbox="321 215 953 583"> <div> <div>Increase Customer Retention</div> <div>Marketing</div> <div>Customer Satisfaction</div> </div> <div> <div>New Item Sales</div> <table border="1"> <thead> <tr> <th>Customer Type</th> <th>Sales</th> </tr> </thead> <tbody> <tr> <td>previous customers</td> <td>~0.65</td> </tr> <tr> <td>new customers</td> <td>~0.05</td> </tr> </tbody> </table> </div> <div> </div> </div> <div data-bbox="283 604 340 636">--ZA</div>	Customer Type	Sales	previous customers	~0.65	new customers	~0.05	<p>Say: The third reason building strong customer relationships is important is because of customer satisfaction. Simply put, happy customers come back. Unhappy customers don't. We talked earlier about how you are 60-70% more likely to be able to sell new items to an existing customer. That is only true if the customer had a positive experience. How they felt about working with us, or the product that they received is extremely important. If they are not a satisfied customer, then they won't have a positive word of mouth or come back again.</p> <p>Advance slide</p>	
Customer Type	Sales								
previous customers	~0.65								
new customers	~0.05								
15) 5 min.	<div data-bbox="321 938 455 992"> <div>Why Is This Important?</div> </div> <div data-bbox="588 873 953 1068"> </div>	<p>Say: Now that we have gone over why it is so important let's see if it changed any of your thinking. Go back to the jamboard. We are putting the link in the chat again if you need it. Add one thing that has changed or that you added to your understanding of why building good customer relationships is so important. Remember your sticky notes are on the side and you want to be on slide one still.</p> <p>Advance slide</p>	<p>Put the link to the jamboard in the chat when the presenter talks about it.</p> <p>https://jamboard.google.com/d/1QAnLdxXvdgXUVDZY3jSDF7kf_vRp76Jck1hOOFS42y5s/edit?usp=sharing</p>						







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16) 1 min.	<div data-bbox="310 313 541 386">3 Easy Ways to Build Relationships</div> 	<p>Say: Now that we know the why behind building good customer relationships let's look at the how. We are going to look at 3 ways that we can build better relationships with our customers.</p> <p>Advance slide</p>	
17) 2 min.	<div data-bbox="321 565 716 594">I. Make sure your customers feel heard</div>  <ul style="list-style-type: none"> <li data-bbox="632 621 972 678">Rephrase what the person said <li data-bbox="632 724 972 781">Acknowledge their feelings <li data-bbox="632 826 972 883">Apologize for the issue 	<p>Say: The first strategy to build better customer relationships is to make your customer feel heard. People need to feel like you are listening to them. It makes them feel acknowledged, important, and like they matter.</p> <p>Ways to do this are to, rephrase what the person says Acknowledge how it made them feel and apologize for the issue.</p> <p>Do: Click to reveal each bullet point</p> <p>Advance slide</p>	

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<p>18) 1 min.</p>		<p>Say: We are going to watch a scenario of a person NOT making sure their customer is feeling heard.</p> <p>As you are watching think about what Tom could do differently in this instance to build a better relationship with his customer. When it is done you will be going into breakout rooms to discuss how Tom could have handled the situation differently.</p> <p>Do: Play the video.</p>	
<p>19) 7 min. [5 min. in breakout rooms, 2 min. debrief]</p>	<div data-bbox="310 686 982 995"> <h3>Breakout Rooms</h3> <ul style="list-style-type: none"> • Discuss how Tom could have handled the situation in a way that would have built a better relationship with the customer. • Choose someone to be the speaker to report back when we come back together on what you discussed. </div>	<p>Say: You are going to go into breakout rooms to discuss how Tom could have handled this in a way that would have built a better relationship with the customer.</p> <p>Choose one person from your group to discuss. We will come back together and share in 5 min.</p> <p>Debrief: When everyone returns to the main room Start the discussion. Say: I hope you all had some good discussions in your breakout rooms. When I call your break out room number if you will share what you and your team discussed Tom could have done differently.</p> <p>[When everyone is finished sharing] Make sure in the discussion the three main points, rephrase what the person says, acknowledge how it made them feel, and apologize for the issue.</p>	<p>Open the breakout rooms. Send out a one minute warning.</p> <p>Close the breakout rooms. Stop screen sharing for debriefing.</p>

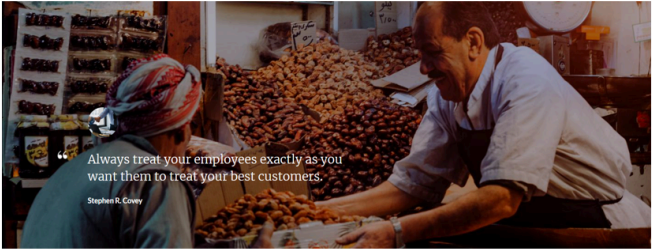
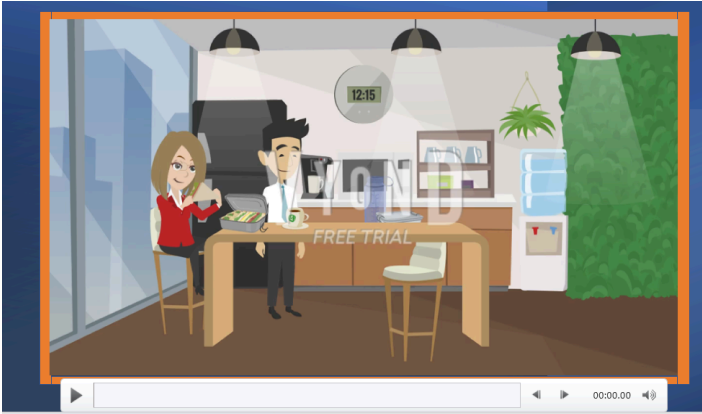
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		Advance the slide	
20) 1 min.	<div> <div> <div></div> <div></div> <div></div> </div> <p>2. Build genuine connections</p> <div>      </div> </div>	<p>Say: The second strategy to building stronger relationships is to make genuine connections with your customers. The helps them feel more connected to the brand and you. This can be done in many easy ways. Simply asking how their day is going. Maybe you can notice something in their profile you could connect too, where they live, that they just had a birthday, that your grandfather has the same name, how is the weather where they are. Maybe you hear their dog bark and you ask about it. Anything that shows interest in their life.</p> <p>Do: Click to reveal each picture as you mention them.</p> <p>Advance slide</p>	
21) 1 min.		<p>Say: Now let's watch Tom as he misses a chance to make a genuine connection with his customer. He gets a call from a customer asking when she needs to renew her subscription.</p> <p>Do: Play the video.</p>	

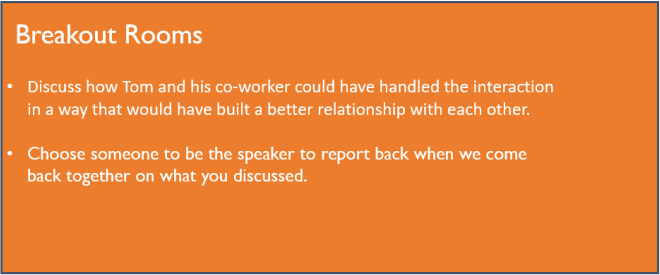
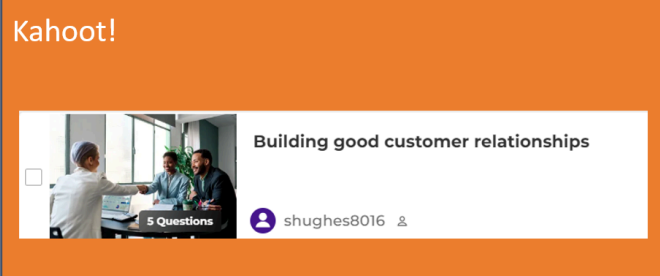
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<p>22) 5 min. [3 min. in breakout rooms, 2 min. debrief]</p>	<div data-bbox="300 199 978 496"><h3>Breakout Rooms</h3><ul style="list-style-type: none">• Discuss how Tom could have handled the situation in a way that would have made a genuine connection with the customer.• Choose someone to be the speaker to report back when we come back together on what you discussed.</div>	<p>Say: We will go back to our breakout rooms and discuss what he could have done better, and how he could have made a genuine connection, very quickly.</p> <p>Choose one person from your group to discuss. We will come back together and share in 3 min.</p> <p>Debrief: When everyone returns to the main room Start the discussion. Say: I hope you all had some good discussions in your breakout rooms. When I call your break out room number if you will share what you and your team discussed Tom could have done differently.</p> <p>[When everyone is finished sharing] Make sure everyone has shared a way to make a connection.</p> <p>Advance the slide</p>	<p>Open the breakout rooms.</p> <p>Close the breakout rooms. Stop screen sharing for debriefing.</p>
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<p>23) 1 min.</p>	<p>3. Begin with colleagues and staff</p> 	<p>Say: Everything we have talked about today begins with your colleagues and your staff first. This quote by Stephen Covey fit this perfectly, Always treat your employees exactly as you want them to treat your best customers. If you want your staff to make your customers feel heard, they need to see what that looks like. If you want them to show genuine concern for your customer. You need to show genuine concern for them.</p> <p>Advance slide</p>	
<p>24) 1 min.</p>		<p>Say: In the next scenario we will see how Tom and his co-worker could apply the last to strategies we just learned; making people feel heard and building genuine connections in the office first.</p> <p>Do: Play the video.</p> <p>Advance the slide</p>	


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<p>25) 5 min. 3 min breakout rooms, 2 min. debrief]</p>	 <p>Breakout Rooms</p> <ul style="list-style-type: none"> • Discuss how Tom and his co-worker could have handled the interaction in a way that would have built a better relationship with each other. • Choose someone to be the speaker to report back when we come back together on what you discussed. 	<p>Say: We will go back in our breakout rooms one more time. Make sure you create an example of what Tom and his co-worker could have done to apply our strategies we just learned. One person from each group will share. You will have 3 minutes.</p> <p>Debrief: When everyone returns to the main room Start the discussion. Say: I hope you all had some good discussions in your breakout rooms. When I call your break out room number if you will share what you and your team discussed Tom and his co-worker could have done differently.</p> <p>[When everyone is finished sharing] Make sure everyone has shared a way to make a connection. Advance the slide</p>	<p>Open the breakout rooms. Close the breakout rooms. Stop screen sharing for debriefing.</p>
<p>26) 7 min.</p>	 <p>Kahoot!</p> <p>Building good customer relationships</p> <p>5 Questions</p> <p>shughes8016</p>	<p>Say: Now that we have learned why it is important to build good customer relationships, and some strategies to do it let's see what you remember. We are going to play a 5 question Kahoot. We will send you the link in the chat for the kahoot. When you sign in use your first and last name. This is how we will track your attendance so make sure that you use your correct name. I will put the questions up and then you will choose the answer.</p> <p>Do: Wait until everyone is logged in.</p>	<p>Put the link to the kahoot in the chat. www.Kahoot.it Pull up the Kahoot game to screnshare. Put the Kahoot in teacher present mode to do as a whole group. Game Pin: 4316887</p> <p>After the game is over go to slide 27.</p>

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		<p>Start the game. Go over the answers after people have answered them.</p> <p>Discussion after the answers: Say: Question 1: Building customer relationships is the best way to ensure customer retention. Question 2: This is False, You can create a connection with a customer in less than one minute. Question 3: Acknowledging feelings and rephrasing what someone has said are the best ways to make someone feel heard. Question 4: They don't need to know if you are having a bad day, find something positive to connect with them. Question 5: Building relationships starts with your work community. If employees see how relationships are being built with them and their colleagues then they will be able to see how to do that with their customers.</p> <p>Advance slide</p>	
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27) 1 min.	<div><div><div><div><div></div><div></div><div></div></div><div><h3>Summary</h3><ul style="list-style-type: none">• Customer relationships are important.• They don't have to take long to build.• They start with your employees and coworkers</div><div></div></div></div></div>	<p>Say: Are big takeaways are (read the screen) As you go back to work today think about one way that you could implement one of these strategies into your day. Thank you so much for spending your time with us today. I will be here for about 5 minutes if you have any questions. If not you are free to go.</p> <p>Exit slide</p>	