

Workshop 103:

Don't Take It Personally

Overview: This class is the third in a series of three workshops that Collections will offer agents throughout FY2013. One workshop is scheduled toward the end of each Quarter for Quarters 2-4 (i.e., conducted in July, October/November, and January).

A workshop is a class that emphasizes an exchange of ideas and the demonstration and application of techniques, skills, etc. In short, this class does not include the typical lecture/facilitation, but requires the facilitator to ensure participants are engaged and successful in completing each learning objective, as well as keep everything on time.

Time: 60 minutes

Suggested Class Size: 12-16 participants

Materials:

1. Facilitator Guide (FG)
2. PowerPoint (PPT)¹
3. Attendance Sheet
4. Survey Instructions Hand Out
5. Learning Station Signage – Station Number and Name (*2 signs*)
6. Learning Station Instructions (*2 sets*)
7. Learning Station Cards for *Handling the Irate Customer ASAP* (*12 cards*)
8. Flipcharts for *Rolls Off the Tongue* (*2 flipcharts*)
9. Markers for Flipcharts

Learning Objectives: This training will help Collections agents be better prepared to handle irate customer calls and to understand that they should not take such calls personally.

- *Handling the Irate Customer ASAP* (Learning Station #1)
- *Rolls Off the Tongue* (Learning Station #2)

Teaching Techniques:

- Workshop – Two learning stations that correlate to the two above-referenced objectives.
 - Welcome/Introduction (*5 minutes*)
 - Learning Stations (*40 minutes*)
 - Learning Station #1 (*20 minutes*)
 - Learning Station #2 (*20 minutes*)
 - Class Discussion/Results of Activities (*approx. 10 minutes*)
 - Closing (*approx. 5 minutes*)

¹ PPT should be opened to title slide and already in Slide Show mode before participants arrive for class. PPT only used for Welcome/Closing and as a timer for activities.

Welcome/Introduction (5 minutes)

Welcome participants. Explain the purpose of the class, the objectives, and the format.

For example: *“Welcome to Workshop 103: Don’t Take It Personally. This workshop allows you to work and interact with fellow agents to help develop and apply best practices in handling irate customer calls. As you are aware, not every customer is happy to find out you are calling to collect on their delinquent account. In fact, some can become irate. Today, we will cover the following objectives:*

1. *Handling the Irate Customer ASAP*
2. *Rolls Off the Tongue*

You’ll learn more about these once you enter the Learning Stations. As you can see, there are two different Learning Stations – one for each objective. We will divide the class into two groups and each group will move to one of the two stations. You will have 20 minutes to read the instructions and to conduct the exercise. Time will be displayed on the screen and you will hear an audible warning to indicate the end of each exercise. When time has expired, groups switch stations. After both stations are completed by both groups, we will come back together as one group to discuss what we’ve learned.”

Split participants into two equal size groups.² Facilitator determines the best way to create groups (e.g., participants count off 1-2, etc.). Direct each group to one Learning Station. Advance PowerPoint (PPT) to the first 20-minute timer to keep track of time. At the end of the initial 20 minutes, advise groups to move to the next station.³ Begin second 20-minute timer when groups change stations. Finally, begin the 15-minute timer at the initiation of the Class Discussion/Results of Activities.⁴

The facilitator’s main responsibilities include the following:

1. Provide initial instruction on how the workshop is conducted.
2. Keep time.
3. Ensure a smooth transition between stations.
4. Move between Learning Stations to listen in and provide necessary guidance and/or assistance (e.g., if you see a group struggling/not adequately participating, you should intervene).
5. Engage participants in a 10-minute recap⁵ of what they’ve learned. Be prepared to discuss and/or white board/flip chart the following:
 - a. ASAP method of handling irate customers and
 - b. Helpful phrases to use with an irate customer (from *Rolls Off the Tongue* exercise)
6. Ask participants to complete a course survey.

² If there is an odd number of participants, simply place the extra associate into one of the two groups.

³ At the end of a 20-minute period, there is an audible alarm/noise – a man yelling, “Yahoo!” – to indicate time is up. After alarm sounds, the screen goes black. Click once to reset timer. Click again to start next 20-minute period when ready to begin the next exercise. If desired, you can give groups a 2-minute warning before alarm sounds.

⁴ Facilitator should start this timer for the Class Discussion at the end, but should reserve a few minutes (5 or less) for the Closing (i.e., both the Class Discussion and Closing are to be conducted within the 15 minute allowance).

⁵ If running short on time, timer can be adjusted downward minute-by-minute by clicking the <Enter> button once to advance to the next, lower minute and once again to begin the timer. Repeat until you reach desired start time. At the end of the 15-minutes, there is an audible alarm/noise – applause – to indicate time is up. After the alarm sounds, the screen auto advances to the final “Thank you!” slide.

Station #1: Handling the Irate Customer ASAP (20 minutes)

This Learning Station introduces participants to the ASAP technique used to handle irate customer calls. Participants use a deck of 12 cards (see below) to discover the four steps of ASAP, the definition of each step, and example scripts that can be used for each step.

	Step	Definition	Script
Apologize	Acknowledge the customer's feelings.	"I'm sorry for the inconvenience. I can certainly understand your situation."	
Show Concern	Pretend it's you having the problem. How would you like it to be handled?	"I can empathize with your frustration and I can see where you are coming from."	
Accept Responsibility	If you represent the company, you have accepted 100% of the situation.	"I can help. Again, my name is [agent's name]. And, to whom am I speaking?"	
Prepare to Help	Be willing. If the customer senses an insincere apology or a complacent attitude, the customer will remain angry.	"Thanks, [Mr./Ms. Customer]. Again, my name is [agent's name] and I'm here to help. Now, please tell me what happened."	

Participants – as a group – are challenged to identify the four steps of the ASAP technique used to handle irate customer calls (i.e., locate four cards they believe to be the steps). Once the steps are identified, the group lines the steps up in a single column (as illustrated above) placing them in the order they believe to be the first to the last step. Next, the group identifies the definition of each step and places it next to its respective step forming a second column. Finally, the group identifies a script that can be used with each step and places it next to the definition of each step creating a third column.

Upon completion of the identification of the steps, definitions, and scripts, the group leader calls over the facilitator to: (1) Confirm they have correctly completed the activity or (2) Advise they need to rework their answer.

Once the group successfully completes the card activity, they form a Wagon Wheel to role play and practice using the ASAP technique. The group leader centers the rest of the participants around him/her in a circle/wheel formation. The group leader plays the role of the customer reading the provided irate customer script. Associates take turns replying to the customer using the ASAP steps.

Directions:

1. This is a 20-minute activity divided into two 10-minute sections:
 - a. ASAP Technique – Uses a deck of 12 cards to identify the four steps of the ASAP technique used to handle irate customer calls, as well as the steps' definitions and helpful scripts.
 - b. Wagon Wheel – Role play using the ASAP steps identified in the first half of the activity.
2. ASAP Technique⁶ (10 minutes)
 - a. The group leader⁷ reads Part I of the Learning Station instructions aloud to the group.
 - b. The group leader takes the deck, turns all 12 cards over, and spreads them out across a desk/table.
 - c. The group identifies four cards they believe to be the four steps of handling an irate customer call and line them up in a single column from what they believe to be the first step through the fourth step.
 - i. The group repeats this procedure to identify the definition of each step and places it next to its respective step creating a second column.
 - ii. The procedure is repeated a third time to identify a sample script that can be used for each step. Each sample script is lined up next to its respective step and definition to create a third column.
 - d. Once the group believes they have the correct steps, etc., the group leader calls the facilitator over to confirm/correct their work.
 - i. Correct – Facilitator congratulates group and confirms they have correctly identified the ASAP technique.⁸ Facilitator then asks the group to move to the Wagon Wheel part of the activity.

⁶ At no time should participants be made aware that ASAP is the name of the technique. They should be allowed to believe ASAP means "As Soon As Possible." Once the facilitator confirms the group has the steps in the correct order, it should be revealed that ASAP is an acronym for the technique.

⁷ Facilitator instructs participants how to choose a group leader for each station (e.g., participant in each group whose birthday comes first on the calendar, participant in each group who is wearing the most jewelry, participant in each group whose first name comes last alphabetically, participant in each group who was the last to arrive at the Learning Station, etc.). This must be done prior to each time groups begin a new Learning Station.

⁸ See footnote 6. At this time, the facilitator reveals the ASAP in the activity title refers to the actual technique used to handle irate customer calls. The acronym will help agents more easily remember the technique.

- ii. Incorrect – Facilitator confirms the group has something out of place and needs to rework their cards. The facilitator can provide help, as he/she feels necessary.
- e. Once the first part of the activity is successfully completed, the group moves on to the second part.
- 3. **Wagon Wheel (10 minutes)**
 - a. The group leader reads Part II of the Learning Station instructions aloud to the group.
 - b. Group leader asks the rest of the group to form a circle/wheel around him/her.
 - c. Group leader assumes the role of the irate customer and reads the irate customer script aloud to the group.
 - d. Once the script is read, the group leader asks the group for the first step in the ASAP technique. Once identified, the group leader should work his/her way around the wheel asking each participant how he/she would demonstrate the step by providing a sample script.
 - i. Group leader should work his/her way through all four steps and ensure all participants are provided a chance to role play on each step.

Station #2: Rolls off the Tongue (20 minutes)

This Learning Station helps participants identify useful phrases and statements that can be easily recalled and used to address irate customer concerns. Having these phrases and statements in their vocabulary/repertoire allows agents to quickly address and defuse irate customer calls (i.e., the appropriate phrase or statement “rolls off the tongue”).

Participants – as a group – work their way through five categories of useful statements/phrases they can use on irate customer calls:

1. Statements of willingness
2. Statements of empathy or apology
3. Statements you can use when you cannot say “yes”
4. Statements you can use when there are no options
5. Statements/phrases to avoid

The group begins with the first category – Statements of willingness. The group leader rolls a die to determine how many phrases or statements the group should come up with to support the category (e.g., if a four is rolled, then the group must identify four phrases or statements of willingness they can use on irate customer calls). This process is repeated until all five categories are completed. If time allows, categories can be revisited to add more phrases or statements.

Directions:

1. The group leader begins by reading the Learning Station instructions aloud to the group.
2. Using a flipchart⁹, the group leader writes a category (e.g., Statements of willingness) across the top of the page.
3. The group leader rolls the die to determine the number of phrases or statements the group should produce for the category.

⁹ Flipcharts encourage group collaboration. Flipchart should face away from Learning Station #1 so group at that station cannot see responses. If flipcharts are unavailable, sheets of paper can be substituted.

4. The group leader asks participants to provide phrases or statements to support the category and writes each on the flipchart until the requisite number is reached.
5. Using a new page for each category, repeat Steps 2-4 until all five categories are completed.
6. If time allows, the group leader should revisit any of the categories to list additional phrases or statements (e.g., the group was only required to provide one phrase/statement for the first category – group leader should revisit and ask if anyone has any more phrases or statements).
7. Upon completion of the activity, group leader turns over the last page used on the flip chart to ensure next group does not see their responses.¹⁰

Group Discussion/Results of Activities (approx. 10 minutes)

After completion of both Learning Stations by both groups, the facilitator should engage participants in a discussion of their findings. Begin by asking participants about the ASAP technique for handling irate customer calls. Chart the four steps reinforcing the acronym ASAP and explain they can quickly calm irate customers by using these four steps. Review each step and ask for volunteers to give examples of scripts they came up with during the *Handling the Irate Customer ASAP* activity.

Finally, the facilitator should review the helpful phrases and statements the groups came up with during the *Rolls off the Tongue* activity.¹¹

Closing/Questions (approx. 5 minutes)

Facilitator should:

1. Answer any questions and/or concerns participants have regarding the workshop and advise he/she will remain after class to address questions participants might want to ask privately.
2. Thank participants for their time, attention, and engagement in the workshop.
3. Pass out *Survey Instructions* hand out before/as associates leave the classroom.

¹⁰ Only applies to the first group at Learning Station #2 to ensure the second group at the station does not see first group's answers. Pages can be revisited by facilitator during the final group discussion.

¹¹ Facilitator can utilize the flip chart pages completed during the brainstorming exercise. He/she can review pages to create a master list or ask group leaders to read the benefits while he/she writes them on a new flip chart page.