

Customer Service Skills Training & Certification

Department/Division:

Cross-campus initiative but primarily driven out of President's office

Format:

2.5 day in-person workshop, needs assessment, certification exam, post-workshop support

Summary

Sample Institution is embarking on a campus-wide initiative to elevate the student, faculty, alumni, staff, and community experience through enhanced customer service awareness and culture.

Launched in 2022, this institutional initiative recognizes their commitment to create a liberating and empowering experience for all and an environment that speaks to their right to be the very best. This Initiative requires that they apply our core values in advancing the university, and that they serve, treat, and teach others with respect and excellence. It demands that they use feedback for continuous improvement in business processes, implement best practices in their work throughout our university, and measure their efficacy in the range of strategies and tactics required to meet their standard of excellence.

In collaboration with campus leaders, this training is intended for frontline staff and managers from across the institution who will act as internal "service excellence champions" to work with other faculty and staff to enhance service excellence within their respective areas. Attendees will leave the workshop with increased confidence in their customer service skills, a heightened ability to handle a wide variety of service scenarios, and the capability to train others on a variety of topics.

Program Details

This unique training will allow participants to become Certified Trainers with the capability of delivering Academic Impressions Customer Service Skills Trainings to fellow students, staff, & employees. The training will include:

- Review of key concepts in service excellence
- Introduction to training workbook and materials
- Critical presentation and facilitation skill-building
- Final presentations
- Hands-on practice

Certification Exam

After participating in this 2.5-day, in-person workshop, attendees will take an exam that will establish a baseline of common understanding across the cohort of trainers. This component is crucial in ensuring that the integrity and effectiveness of subsequent trainings for the campus community. Additional support from Heath Boice-Pardee is available for any attendees to make sure that everyone is ready and at an adequate skill-level prior to taking the exam.

Post-Workshop Support

A follow-up visit to campus, ideally hosted about 3-6 months following the workshop, is included in pricing for this training experience. We'll use this follow up visit to assist institutional leadership in assessing the initiative and planning for future modifications and implementation. AI will prepare and share evaluative data collected from the participants of the workshop and will help identify and strategize next steps to ensure that this learning experience leads to lasting and sustainable change.

Program Agenda - Day 1

Welcome and Introductions (15 mins)

What does it mean to be a “Certified Trainer” or “Service Excellence Champion”? (1 hr)

In this session, we will discuss your role as a Certified Trainer for Customer Service Skills. This will be an interactive session where we co-create role expectations, define your target audiences, and identify key skills/strengths/opportunities for you individually to explore during the duration of this training.

What Core Service Competencies are Needed? (60 mins)

This session will give you the context to identify and speak the language of service competencies. Not all roles require the same competencies, but there are surely some that are universal. We'll cover common service competencies that advance the institution's core values (Responsibility, Excellence, Integrity, Inclusiveness, Learning), review case studies showing practical examples, and allow you to engage in a self-assessment of your own competencies for personal growth.

Lunch: Discussion, Share Insights, and Questions (75 mins)

Over lunch, discuss what insight you've gained so far and what questions you have moving forward.

Enhancing Communication Through Writing and Scripting (1 hr)

This session will focus on the art of scripting as a means of ensuring consistency across service channels. You will be given time at the end of the session to write your own scripts for phone, email, face-to-face, and virtual conversations including greetings, closings, and apologies.

Active Listening and Communication Strategies (1 hr)

You will build upon your knowledge of scripting to look more holistically at the four key phases of the conversation cycle. You'll learn how to help navigate through unclear student requests and questions, as well as how to avoid using jargon in your interactions with students.

Putting Scripting, Active Listening, & Communication into Practice (1 hr)

During this role-playing activity, you will break into groups and work together to practice and apply the scripting and conversation cycle techniques you learned in the previous sessions.

Review of the Day & Takeaways (15 mins)

Program Agenda - Day 2

Reflections, Questions, & Agenda for the Day (15 mins)

Policies and Practices that Impact Service (45 mins)

Higher education is a place where policies—both formal and informal—proliferate. This session will provide examples of formal policies you need to be aware of that have implications for the way you provide service. It will also challenge you to think about informal policies or practices that may be creating service barriers.

Assisting Difficult Customers (90 mins)

From students to colleagues to parents and alumni, you are likely to come across a variety of stakeholders that can be challenging to assist. This session will focus on how to manage the occasional difficult and/or potentially volatile situations you may find yourself in. We will discuss best practices for saying no, ensuring safety, escalating the situation and asking for help, and adhering to your service standards. You will be given time at the end to role-play in small groups and practice the techniques you learned.

Making an Impact with First Impressions (1 hr)

First impressions matter. As we seek to help move this initiative forward, we will spend time unpacking what first impressions mean and what first impressions your students, staff, faculty, alumni, parents, etc. receive. This session will challenge your thinking about initial points of contact including communications (telephone/email/chat/website), creating welcoming environments (common spaces, signage and offices), and the messages that you are providing, even if you never speak with them.

Field Work (1 hr)

Take what we've discussed about first impressions and take a walk around campus. Conduct a quick "Servicescape" audit.

Field Work Debrief (1 hr)

Prep for Day 3 Facilitation Practice/Exam (1 hr)

As part of the Train the Trainer Certification, each of you will facilitate about 5 slides of content from the training to a group of your peers. Use this time to select your slides (you may modify or not) and prepare your presentation for Facilitation Practice tomorrow.

Program Agenda - Day 3

Reflections, Questions, & Agenda for the Day (15 mins)

Facilitation Practice (45 mins)

You will be broken up into groups and facilitate your 5 slides to your peers for practice and feedback. You will choose one person from each group to present to the larger group as a "final presentation."

Final Presentations (1 hr)

Closing Reflections and Next Steps (30 mins)

You've learned a lot! We will use our final half hour to answer any outstanding questions and provide you with more information about the online certification test. To receive your Service Excellence Certification, you must successfully complete an online exam that will help you solidify and demonstrate everything you have learned. Attendees will receive a link to the exam after the workshop closes and will have one week to complete the test.

Self-Directed Exam

Exams will be distributed for attendees to complete and submit on their own time.

Workshop Faculty

Dr. Heath Boice-Pardee, Head of Practice, Service Excellence, Academic Impressions

Dr. Heath Boice-Pardee worked as an administrator in higher education for 30 years in a variety of roles including Assistant Dean at Rutgers University, Associate Vice President for Student Affairs and Interim Senior Vice President for Student Affairs at Rochester Institute of Technology (RIT). Additionally, he teaches in the School for Individualized Studies at RIT and developed a higher education administration Master's concentration in service excellence and the student experience. Given his passion for the topic, he joined Academic Impressions as their first Head of Practice for Service Excellence in higher education early this year.

Heath is an international expert on service excellence in higher education and has presented on the topic at universities including NYU, Prairie View A&M University, University of Alberta and Okinawa Institute of Science and Technology. He has worked with hundreds of professionals in higher education on enhancing customer service, overcoming roadblocks, and fulfilling service visions. His first academic book, *Elevating Customer Service in Higher Education: A Practical Guide* was co-authored and published by Academic Impressions in 2018.

When not geeking out about customer service, you can find him at Disney World (where he is likely geeking out about customer service), cooking for his family and friends in Rochester, NY, and writing mystery novels about a Dean of Students at a fictitious college on the Jersey Shore.

Our members and partners that have brought this workshop to their institutions:

North Carolina A&T State University

Delaware State University

University of the District of Columbia

University of Alberta

Tufts University

Northern New Mexico College

University of Maryland Eastern Shore

New York University

Prairie View A&M University