

STRANDS AND STANDARDS

CUSTOMER SERVICE



Course Description

The focus of this course is for students to gain an understanding of the skills, aptitudes, and thought processes necessary to achieve customer satisfaction and loyalty in a variety of settings. Students will learn and develop customer service strategies as well as the skills and abilities necessary for working with customers; this will include helping customers to make decisions as well as resolving concerns and issues that may arise. Students taking Customer Service should have the opportunity to participate in DECA or FBLA. These CTSOs are state approved for all Business, Finance and marketing courses.

Intended Grade Level	10-12
Units of Credit	0.5
Core Code	37.01.00.00.025
Concurrent Enrollment Core Code	37.01.00.13.025
Prerequisite	N/A
Skill Certification Test Number	403
Test Weight	0.5
License Area of Concentration	CTE and/or Secondary Education 6-12
Required Endorsement(s)	
Endorsement 1	Business & Marketing (CTE/General)
Endorsement 2	Business & Marketing Essentials
Endorsement 3	N/A

STRAND 1

Customer Service - Students will explore job opportunities in client and sales representative careers.

Standard 1

Determine the necessary education, training, experience, and potential salaries of this job outlook.

- Discuss career opportunities in your local area that are available in a service industry. That is both high demand and high wages.
- Define the following terms and concepts
 - **Customer Service:** the assistance and advice provided by a company to those people who buy or use its products or services.
 - **CX/Customer Experience:** the internal and subjective response customers have to any direct or indirect contact with a company.
 - **Client Care:** is the process of looking after customers to best ensure their satisfaction and delightful interaction with a business
 - **Account/Client Representative:** someone who is responsible for customer or client accounts.
 - **Customer-Focused Organization:** a business that operates completely around their relationships with clients and client satisfaction. Decisions are made based more around the needs and wants of customers, rather than technical or sales operations.
- Discuss how customer service is expanding through emerging opportunities in different industries.
 - **Subscription Based Industries:** Examples (Stitch Fix, Hellofresh, Spotify, Birchbox). A product(s) shipped direct to the customer for a monthly or annual fee.
 - **Convenience and Delivery Industries:** In-store pickup, curbside pickup, ordering online or through an app. Examples (DoorDash, Uber, Postmates)
 - **Call and Chat Centers:** a facility that handles inbound and or outbound calls on behalf of an organization
 - **Retail:** selling goods to the public both through a physical store, online, apps, or through social media platforms.
 - **Omnichannel Retailing:** defined as an approach to sales that focus on providing seamless customer experience whether the client is shopping online from a mobile device, a laptop or in a brick-and-mortar store
 - **Wholesale:** Business to Business sales
 - **Service Industries:** beauty, medical, hospitality and tourism, lodging and recreation, and sports/entertainment

Standard 2

Students will understand customer satisfaction; what it is and how it can be measured from both customer and company perspectives.

- Discuss and Define the following:
 - **Customer Satisfaction:** a measurement that determines how happy customers are with a company's products, services, and capabilities.
 - **Customer Perspective:** Customers are always looking for opportunities to improve their situation. Often they value three main ideas: speed, quality and price.
 - **Company Perspective:** Companies are always looking to maximize profits and maintain repeat business while ensuring customer satisfaction.

Performance Skills

- Use critical thinking to complete a job exploration project. Choose a client or customer care career and include all of the following: education, salary, training and/or experience.

STRAND 2

Target Market - Students will identify and understand how to determine the target market for a variety of sales and service industries.

Standard 1

Identify and explain the importance of a **customer profile** defined as a detailed description of your current customers.

- Explain how customer profiles help to determine a specific industry or organization's target market.
- Discuss how customer profiles are used to decide where to spend your promotional dollars.
- Identify and explain how a customer profile can help obtain new customers or retain existing customers
- Describe how organizations use a customer profile through market segmentation.
 - **Demographic:** Who? (Personal characteristics such as Age, Gender, Income Level, Education Level, Race, Ethnicity)
 - **Psychographics/Interests:** Why? (Involves grouping people with similar lifestyles, as well as shared attitudes, values, and opinions such as Activities, Attitudes, Personality & Values)
 - **Geographics/Location:** Where? (Segmentation based on where people live such as Natural or Political Boundaries, Climate, Cultural influences, and Customs)
 - **Behavioral:** How? (Looking at the benefits desired by consumers such as shopping patterns, usage rate, benefits--and not just the physical characteristics of a product)
- Discuss **customer expectations** based on the market segmentation. Here are the starting points of discussion for each market segmentation.
 - **Demographic:** High income customers would expect a higher quality product
 - **Psychographic:** Conservative customers will expect that a company supports conservative causes both politically in their company culture.
 - **Geographic:** Customs of an area would be respected in all communications while building customer rapport.
 - **Behavioral:** Loyal customers might expect more out of an experience.
- Identify the processes used in **client prospecting**
 1. Research your Leads
 2. Qualify your leads
 3. Identify your leads
 4. Prioritize your decision maker
 5. Reach out and schedule a meeting with the decision maker
- Discuss and identify key components of **omni-channel customer service**.
 - Chat box, delivery, in person, online, social media, and word of mouth through reviews online and in-person.

Performance Skills

Use problem solving skills to define the ideal customer profile. Solve a business problem through exploring a DECA or FBLA role play or use a case study from a recent current event.

STRAND 3

Customer Service Soft Skills - Students will discover & develop critical aptitudes and “soft skills” in sales and service careers.

Standard 1

Identify and discuss customer service traits and behaviors needed to provide excellent customer service.

- **Follow directions** from employers to provide relevant information from company policies. Employees should always advocate the employer’s interest.
- **Communicate clearly** and provide step by step instructions if a customer involved solution is required.
- **Ask meaningful questions** and focus on solutions that both the customer and your employer can agree on.
- **Represent professionalism** on and off the job. Use appropriate language and customer-centered vocabulary. Keep emotions in check.
- Provide a timely and accurate response to all customer questions.

Standard 2

Identify and discuss **empathy** and **professionalism** needed in effective customer service.

- Discuss ways to show **empathy**, the action of understanding, being sensitive, and vicariously experiencing the feelings, thoughts, and experiences of another.
 - Show respect for the customer by giving them your undivided attention, listening carefully, acknowledge customers’ questions and concerns through **active listening skills**. (See following standard)
 - Build a relationship of trust through related experiences and showing sincere appreciation for the customers concerns.
- Clearly illustrate the soft skill of **professionalism** including;
 - Clean and well-kept attire appropriate for the specific work environment.
 - Easy distinction between employees and customers.
 - Confidence and poise.
 - Positive and helpful attitude.

Standard 3

Discuss **effective communication skills** to ensure a positive customer service experience.

Describe the importance of language in effective communication skills.

- Explain that **verbal skills** are important in building credibility and to convey product knowledge to customers

Verbal skills used to build credibility:

- Limit filler words that make you seem like you are trying to remember facts or details. (Ex. uh, um, like, and y’know)
- Voice Inflection: a manner of speaking in which the loudness or pitch or tone of the voice is modified
- Pronounce words correctly and avoid made-up words such as Irregardless, anyways, towards, search up, supposedly, and Should of.
- Appropriate word choice (i.e. avoiding slang, jargon, non- positive words such as can’t, won’t, wouldn’t, no)
- Compare denotation v. connotation. Words that have a different literal definition, versus their figurative meaning.

Explain both negative and positive examples of **Non-Verbal skills** in customer service communication.

Eye Contact

- Negative - avoiding your customer or looking outside your sales space.

- Positive - looking back to your customer's face and at your products

Facial Expressions and Smiling

- Negative -closed, firm or expressionless mouth, eating or chewing gum while communicating
- Positive -smiling or relaxed mouth

Body Language and Posture

- Negative -slouching, shoulders turned away
- Positive -standing upright, inclining the body forward

Proxemic Distances

- Intimate: 0-2 feet, spouse, family,
- Personal: 2-4 feet, friends
- Social: 4-12 feet, acquaintances
- Public: 12 feet, strangers

Gestures

- Negative-closed arms, dismissive hand gestures, hands folded to the chest or near the face
- Positive- open arms, nodding the head, hands moving freely, relaxed, touching the product

Standard 4

Explain that **listening skills** are the most needed yet underused skill for effective communication in customer service.

Define the following and explain in detail with examples from customer service situations.

- **Active listening** in customer service
 - **Pay attention** through eye contact and body language
 - **Show that you're listening** through facial expressions and gestures such as head nodding and leaning forward.
 - **Provide feedback** by repeating back what you heard in your own words and by asking clarifying questions.
 - **Defer judgment**, be patient and do not interrupt the customer.
 - **Respond appropriately** by keeping your emotions level and voice calm. Provide accurate and quick information on how the conflict will be resolved.
- **Passive Listening**: listening without responding to the speaker. Example during a lecture or a keynote speaker where interaction is not expected.
- **Negative Listening**
 - **Pseudolistening**-Putting on a facade when it comes to actual listening. Faking like you're listening when in reality you've got other things on your mind.
 - **Selective Listening**-Having a bias for or against a person, or a topic, that makes you selective in what you retain. People pay attention to things they find interesting, ignore things we do not.
 - **Superficial Listening**-Paying attention to details not relevant to the situation. Missing the larger message that a person is saying
 - **Defensive Listening**-Already planning what you will be saying to someone before they've finished speaking. Becoming a "one-upper" and having a cognitive response made up before they finish.
 - **Disruptive Listening**-Constantly interrupting people while they are speaking. Going out of your way verbally/nonverbal to show someone that you're not listening to them.

Listening v. Retaining. Explain the difference between listening and retaining information to be able to recall and deliver in the future.

Performance Skills

- Participate in a listening self-assessment. Create a list of terms or ideas on a product or service that students need to memorize and retell without cues or notes.

- Practice customer service communication skills by participating in an individual or team role play from DECA or FBLA that has a customer service scenario.

STRAND 4

Customer Rapport and Personal Inventory - Students will identify skills to build customer rapport: the ability to develop and maintain a positive relationship with a client or customer.

Standard 1

Describe the steps to building customer rapport

1. **Opening:** greeting by acknowledging the customer quickly with a friendly demeanor
2. **Discovery:** questioning through active listening
3. **Resolution:** through clarifying, paraphrasing, and summarizing
4. **Ownership:** employee empowerment by clearly defining what the employee is allowed and limited to do in resolving issues. Employees own the process of finding solutions.

Standard 2

Explore and understand the aptitudes needed in the customer service process.

- Personality traits and aptitude
 - Explain the idea of personality tests and how they are used as means of filtering personalities that may not be well suited to customer service.

Standard 3

Describe the importance of customer service aptitudes and traits in demonstrating product knowledge

- Assess how certain aptitudes may hinder or encourage an employee's ability to develop a strong base of product/service knowledge.
- Identify common online KPIs (Key Performance Indicators) to measure customer satisfaction. (Cstat, testimonials, Net promoter Rating, Customer Service Reviews)

Performance Skills

- Complete a free customer service aptitude test online (Preferably the Big 5 aptitude test). Have students create a SMART goal for improving their score in an area where they may need improvement.

STRAND 5

Omnichannel Resources - Students will understand omnichannel resources, an approach to sales that focus on providing seamless customer experience whether the client is shopping online from a mobile device, a laptop or in a brick-and-mortar store used to enhance customer experiences.



Standard 1

Students will identify omnichannel resources to communicate with customers.

- Identify tools to communicate with customers and the effectiveness of these tools in different industries.
 - Phone: inbound, outbound, notification, and text messaging
 - Electronic: e-mail, surveys, online rating/reviews, and chatbots
 - Print Mediums: flyers, catalogs, postcards, and billboards
 - Broadcast: TV, radio, and video platforms
 - Digital Marketing Platforms/ Social Media sites: in app ads, push notifications, online review, and payment methods
 - Other methods of communication

Standard 2

Students will understand the use of **CRM** as it relates to the customer service experience.

- Define CRM: Customer Relationship Management System is a technology for managing all your company's relationships and interactions with customers and potential customers.
- Share example and research current CRM platforms
 - What customer service features do they provide
 - How do these features translate into a better customer experience
 - Explain how CRM systems contribute to an organization's productivity

Standard 3

Students will understand the impact **confidentiality** has on reputation and goodwill in customer service.

- Identify reasons for customers to expect privacy in a variety of service settings (ex. health, service, travel/tourism, and sports/entertainment)
- Investigate the need for security measures to protect information gathered and maintained by companies.
 - Protection of personnel records
 - Protection of business records
 - Protection of customer information
 - **Internal** (leaking information) and **external** (hacking) threats

STRAND 6

Customer Satisfaction - Students will evaluate, develop, and measure customer loyalty and customer satisfaction.

Standard 1

Define and explain the importance of customer satisfaction, loyalty, and the need to be able to calculate customer lifetime value.

- **Customer Satisfaction:** a measurement that determines how happy customers are with a company's products, services, and capabilities.
- **Customer Loyalty:** an ongoing emotional relationship between you and your customer, manifesting itself by how willing a customer is to engage with and repeatedly purchase from you versus your competitors.
 - **Customer Lifetime Value (CLV)** - The total revenue earned by the entire relationship (including future purchases) with a customer.

Standard 2

Identify reasons a company would utilize resources to enhance customer experiences

- Identify ways a company could increase/decrease sales by customers experiencing positive/negative interaction.
 - Word-of-mouth, customer loyalty, referrals, **goodwill** (the value found in your company's good name and recognition value), poor reviews, forums, rate of use
- Describe the benefits and ethical implementation of using a "secret shopper" program to ensure the quality of customer service provided.

Standard 3

Improving customer satisfaction.

- Identify and understand the implementation and use of common **loyalty programs**.
 - Points for purchase
 - Tiered rewards
 - Memberships (free and paid)
 - Humanitarian causes (donation of money or goods to a charity/cause for customer purchase)
 - Partnering with other companies/causes
 - Games/sweepstakes (both purchase and no purchase necessary)

Performance Skills

- Students should select a company from an industry he/she is interested in. Research and evaluate a current customer service program for selected companies and suggest changes to increase clarity, efficiency of employees or achievement of customer service goals.
- Students will analyze a case study that asks them to problem solve a negative customer service interaction. Case studies can be found in either DECA or FBLA resources.

STRAND 7

Pathways, Post Secondary, and Careers in Customer Service - Students will understand the opportunities to graduate as a pathway completer, the post secondary programs and Career opportunities in Customer Service.

Standard 1

Choose either or both the Marketing Pathway or the Business Administration Pathway to describe the following that are offered at your school.

Identify the "Explorer" courses offered at your school

Identify the "Concentrator" courses taught at your school

Identify the "Completer" course for the Accounting and Finance Pathway

Standard 2

Certifications, Licenses, and Degrees in Sales and Customer Service. Research the opportunities available in your region of the state. Present these opportunities to your students. Include commitment and cost of the opportunity and its earning potential.

Certifications and teacher Community Colleges

[UVU Professional Sales Certificate](#)

[USU Certified Tech Sales Professional](#)

University Degrees Available

[Weber State Sales College](#)

[U OF U Professional Selling & Business Development](#)

[SUU Professional Sales Program](#)

Standard 3

Careers in Customer service

Explore current job postings in this field to introduce students to the fact that this is a high wage high demand field. There are many options that are available based on different strengths.

[Bureau of Labor and Statistics](#)

[Utah Work Force Service](#)

Skill Certification Test Points by Strand

Test Name	Test #	Number of Test Points by Strand										Total Points	Total Questions
		1	2	3	4	5	6	7	8	9	10		

Skill Certification Test Percentages by Strand

Test Name	Test #	Number of Test Percentage by Strand										Total Percentage	Total Questions
		1	2	3	4	5	6	7	8	9	10		