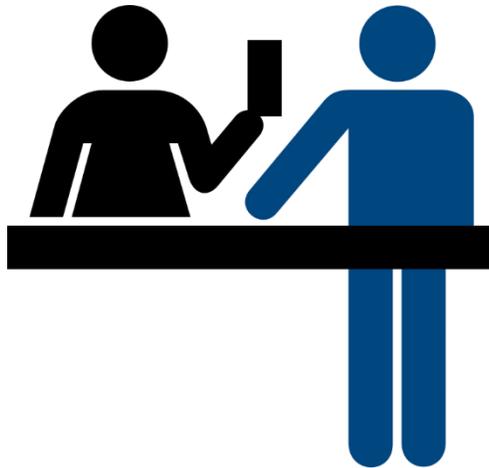


Get Set for Customer Service



Canada 



Ontario 

Outline:

Session	Topics
1	<ul style="list-style-type: none">• Defining customer service• Customer service fields• Employment research
2	<ul style="list-style-type: none">• Skills for Success in customer service• Skills for Success assessments
3	<ul style="list-style-type: none">• Verbal communication• Written communication
4	<ul style="list-style-type: none">• Working in Sales• Selling customers products & warranties
5	<ul style="list-style-type: none">• Problem solving & dealing with conflict• Team work• Work ethic & confidentiality• Stress management & personal care
6	<ul style="list-style-type: none">• Digital skills in a customer service job• POS systems
7	<ul style="list-style-type: none">• Numeracy in customer service jobs• Documents & charts
8	<ul style="list-style-type: none">• AODA training• Training & continuous learning
9	<ul style="list-style-type: none">• Customer service resumes• Interview skills
10	<ul style="list-style-type: none">• Practical training day

Introduction

In this learning series, you will learn skills that will help you in a customer service profession. The first step in this journey is determining what skills you already have and what skills you can improve.



ACTIVITY

Complete the assessment package. The purpose of this assessment is to determine what tasks you can already complete independently and what skills you will upgrade during this learning series.

When you have completed the assessment, make sure your name is on the package and hand it to your facilitator.

Learning Styles

It is also important to understand how you learn best.

There are 3 learning styles:

1. **Visual:** understanding and learning best when information is presented visually through written information, pictures, charts, graphs, etc.
2. **Auditory:** Understanding and learning best when information is presented in an auditory manner. Hearing information through voice, music, sounds, etc.
3. **Kinesthetic:** Understanding and learning best when information is presented through experience. Using ones hands or bodies to experience concepts being taught.





DISCUSS

Why is it important to understand how we learn best?

Why is understanding the different types of learners important when preparing for employment?



ACTIVITY

Complete the learning style survey to determine what type of learner you are. When completed, make sure your name is on it, and hand it to your facilitator.



LEARNER PLANS

The learner plan is a tool for yourself and your facilitator to use, to plan and monitor your goal, learning activities, milestones, additional supports required and referral results.

Review your learner plan and complete the following tasks:

1. On page 1, print your first and last name in the box labelled “*learner*”.

A. GOAL PATH and OALCF COMPETENCIES
Learner:

2. On page 1, print your learning style in the box labelled “*what is the learner’s learning style?*”

What is the learner’s learning style?

3. On page 6, sign your name in the box labelled “*learner*” and print today’s date in the box labelled “*date*” to the right.

I agree to the content of this Learner Plan.		
Learner:	<input type="text"/>	Date:

When you have completed these tasks, hand your learner plan to your facilitator. We will review your learner plan on a regular basis throughout the learning series. At the end of the learning series, you will be provided with a copy of your learner plan.

Milestones

Milestones are activities you will complete during the program. They allow you to demonstrate your ability to successfully complete specific tasks related to your goal.

In this learning series, you will complete 2 milestones. As you saw on your learner plan template, you will complete the following milestones:

- a) Milestone 3: Read an information sheet.
- b) Milestone 49: Compare survey data and make calculations.



SESSION 1

In this session you will develop the following skills for success:

Collaboration	You will work collectively with your classmates to complete task based activities with a mutual goal.
Communication	You will practice your verbal communication skills while discussing customer service jobs, and desired work settings.
Digital	You will practice the use of technology to research customer service jobs.
Reading	You will find, read and understand information about customer service skills jobs, including what customer service is and where you can work.
Writing	You will document information about customer service roles and work settings.



DISCUSS

What is customer service?

Customer: a person who purchases goods or services from another; buyer; patron.

Service: an act of helpful activity; to help; aid.

Customer Service: assistance and other resources that a company provides to the people who buy or use its products or services.



ACTIVITY

Each person in the room tell the group your first name and something special or unique about yourself.

While working in customer service you will be required to speak to “strangers” on a regular basis. It is important for you to have the confidence to speak to people you are not necessarily comfortable with.



VIDEO:

Watch the videos, “Bad Customer Service Montage” and “Inside Schitt’s Creek: Customer Service” and discuss what was done incorrectly.

<https://www.youtube.com/watch?v=bTbHwnxCGal&t=1s>

<https://www.youtube.com/watch?v=iVtfF3WUNTI&t=2s>



DISCUSS

The videos showed us examples of poor customer service.

As a group, discuss what skills you think are important to have while working in customer service.



ACTIVITY

As a group, discuss the good customer service skills listed below including, what the skill means and why it is important for customer service. Record your answers in the space provided.

<u>Skill</u>	<u>Meaning</u>
Patience	
Attentiveness	
Clear communication	
Knowledge of the product or service	
Ability to read customers	
Persuasion skills	
Time management skills	
Ability to use positive language	
Ability to handle surprises	
Acting skills	

Customer Service Jobs

With customer service skills, you can work in many different employment sectors. Some of these sectors may include:

1. Food & beverage service
 - a. Restaurant hostess/host
 - b. Bartender
 - c. Server
 - d. Food counter attendants
2. Retail
 - a. Retail salesperson
3. Office administration
 - a. General office support workers
 - b. Receptionists
 - c. Call centre attendant
4. Tourism and amusement
 - a. Casino worker
 - b. Hospitality
 - c. Travel agent
5. Sales Associate
 - a. Car dealership
 - b. Cell phone company
 - c. Real estate



ACTIVITY

For each of the employment sectors listed above, brainstorm possible places of employment in your area, and surrounding areas. Record your answers in the chart on the following page and discuss as a group.

<u>Employment Sector</u>	<u>Places of Employment</u>
Food & Beverage Service	
Retail	
Office Administration	
Tourism & Amusement	
Sales Associate	

Career Outlook

Career or employment outlook is a prediction of the change in the number of people employed in a specific job over a set period of time. When choosing a career or job, it's important to take into consideration whether there will be jobs available in your chosen field.



DISCUSS

Do you know which occupation you are interested in?

National Occupational Classification (NOC)

The NOC system is Canada's national system of organizing and describing occupations. Every occupation in the Canada job market is assigned a 4-digit code called the NOC code. Using this code, you can research information about your chosen occupation such as, salaries, career outlook, job descriptions, education required, etc.



ACTIVITY

Access the Canada job bank labour market information page. Search for a specific occupation, select Ontario and complete the chart below.

<https://www.jobbank.gc.ca/explorecareers>

Occupation	
NOC	
Wages	
Outlook	
Where can you work?	
Number of job postings in your area	
Education / Experience Requirements	
Skills Required	



DISCUSS

Share your findings with the group. Specifically, what different employment settings can you work in, depending on your chosen occupation?

SESSION 2

In this session you will develop the following skills for success:

Digital	You will practice your digital skills while using a computer to research the 9 skills for success.
Reading	You will find, read and understand information about skills for success that will help you prepare for a customer service job.
Writing	You will document information about skills for success and their role in a customer service job.

Skills for Success

There are 9 skills for success that people need for work. The 9 skills for success include:

1. Adaptability
2. Collaboration
3. Communication
4. Creativity and innovation
5. Digital
6. Numeracy
7. Problem Solving
8. Reading
9. Writing



Skills for Success profiles outline the importance of the skills for everyone.



ACTIVITY

Access the government of Canada Skills for Success webpage.

<https://www.canada.ca/en/services/jobs/training/initiatives/skills-success.html>

- Click on the “Learn about the skills” box
- Explore the 9 skills for success by clicking on each skill to read a description
- Complete the chart on the following page
 - In the “tasks that might be completed” column, list 2 tasks you might complete in a customer service job that will require you to use that skill successfully

Skill for Success	Tasks That Might be Completed
<p style="text-align: center;">Adaptability</p>	<p>1.</p> <p>2.</p>
<p style="text-align: center;">Collaboration</p>	<p>1.</p> <p>2.</p>
<p style="text-align: center;">Communication</p>	<p>1.</p> <p>2.</p>
<p style="text-align: center;">Creativity & Innovation</p>	<p>1.</p> <p>2.</p>
<p style="text-align: center;">Digital</p>	<p>1.</p> <p>2.</p>
<p style="text-align: center;">Numeracy</p>	<p>1.</p> <p>2.</p>
<p style="text-align: center;">Problem Solving</p>	<p>1.</p> <p>2.</p>
<p style="text-align: center;">Reading</p>	<p>1.</p> <p>2.</p>
<p style="text-align: center;">Writing</p>	<p>1.</p> <p>2.</p>



DISCUSS

Share your findings with the group. Did you choose different tasks than your classmates?

SESSION 3

In this session you will develop the following skills for success:

Adaptability	You will practice your ability to adjust your behaviour when communicating with customers.
Collaboration	You will work collectively with your classmates to complete task based activities with a mutual goal.
Communication	You will share and receive information both verbally and written to enhance your ability to serve customers.
Creativity & Innovation	You will practice your ability to develop and apply customer service techniques when communicating with customers.
Digital	You will practice your digital skills whilst communicating information using different platforms.
Numeracy	You will practice the ability to communicate about information containing numbers when working in a customer service role.
Problem Solving	You will practice your ability to identify, work through and solve problems while communicating with customers.
Reading	You will find, read and understand information from various sources.
Writing	You will practice your writing skills while using a variety of methods to share information.

Communication

Communication is an important skill in the workplace because it permits productive and efficient operations.



DISCUSS

What are some ways you will communicate at work as a customer service employee?



ACTIVITY

For each statement below find someone in the group who matches, then print their first name in the box to the right.

Took a bus today.	
Went grocery shopping in the past 2 days.	
Has at least one child.	
Plays a sport.	
Has a birthday this month or next month.	
Has a driver's license.	
Likes the current weather.	
Walked to class today.	



DISCUSS

Who did you approach first? Why?

Being practiced at talking about “everyday” topics, or using small talk can be helpful when you are communicating with new people.

Interpersonal communication is the process by which people exchange information, feelings and meaning through verbal and non-verbal messages:

- FACE-TO-FACE communication
- Not just about what is said, but HOW it is said
- Includes the non-verbal messages sent through tone of voice, facial expressions, gestures and body language

Non-Verbal Listening Skills

Body language and facial expressions are as important or sometimes more important than how you speak. It is estimated that approximately 55% of the messages we receive from others come from body language and facial expressions.

6 Examples of inappropriate body language include:

1. Avoiding eye contact
2. Bad posture
3. Extra body or hand and mouth movements
4. Invading personal space
5. Having a defensive stance
6. Unhappy face



Reading Your Customers

Watching what customers are doing is critical to deciding how to interact with them. You can learn a lot about a customer’s needs or wants based on their non-verbal communication. For example, if a customer enters a retail establishment and is avoiding eye contact, he may not want the help of an employee.



ACTIVITY

For each clue below, match the appropriate customer service representative response.

Customer Clue	Response
The customer is picking up every object in a display. He is comparing the items to each other.	
A man is browsing and picking up items that are probably for a woman.	
The customer walks to one display, looks at it briefly, and then begins to leave the store.	
The customer keeps picking up and then putting down the same item. She seems unable to make a decision.	
The customer walks in with a shopping bag from your store, walks to a display and begins looking for something.	
The customer gets a shopping cart, pulls out a list and begins going up and down each aisle slowly.	

Customer service representative responses:

- A. I'm sorry you didn't find what you were looking for. Can I help?
- B. We just got those in, aren't they great?
- C. Can I help you with a return or exchange?
- D. Looks like you are considering a gift. Is it for a special occasion?
- E. Let me know if you need help finding anything.
- F. You seem undecided. Have you used that product before?

Active Listening

Listening is one of the most important skills you can have. You listen for a number of different reasons. You listen to obtain information, to understand others and to learn new things.

FACT

Research shows that we only remember 25-50% of what we hear. That means when you are talking to someone for ten minutes you only pay attention about half of the time.

Becoming a better listener will help you become more productive and avoid misunderstandings.



Active listening skills can include:

- a) Summarizing: Bringing all the things a speaker has said into a few statements.
- b) Clarifying: Checking what was said if you aren't sure or missed something.
- c) Paraphrasing: Repeating back to the speaker in your own words.
- d) Using open questions: Asking the speaker open questions to get more information or encourage discussion.
- e) Encouraging: acknowledging what is being said with non-verbal cues and thanking a person for what he/she is saying to you.



Open vs. Closed Questions:

An **open question** usually begins with who, what, when, why, how or describe. It asks the respondent to think and reflect or give information. The respondent will give you information, opinions and feelings.

A **closed question** can usually be answered with a single word like yes or no, or a short phrase. Closed questions give you facts, are easy to answer, and are quick to answer.

Communication Barriers

When communication breaks down it is usually because of a barrier. Some barriers to communication include:

1. **Physical Barriers:** Things that get in the way of being able to see or hear well. These might include loud noises, hearing or vision impairments, illness, phone volume, messy penmanship.
2. **Perceptual Barriers:** When you see a situation through your own filters, which might include your own experiences, interests, upbringing, culture, or religion.
3. **Emotional Barriers:** Communication can be affected if the sender or receiver is feeling a strong emotion such as, anxiety, fear, anger, excitement or embarrassment.
4. **Language Barriers:** Communication can break down because of language differences, strong accents, speech problems, use of jargon or slang, incorrect spelling or grammar errors.



DISCUSS

Can you think of a time in your life when you experienced a communication break down? Which barrier do you think affected your ability to communicate effectively?

Everyone communicates in different ways. Some methods are more effective than others. If you feel that your way of communicating is not working, you can change it.

4 common communications styles include:

<p><u>Aggressive:</u> An aggressive communicator is direct in expressing his needs, wants and opinions and gives no thought to other people's.</p>	<p><u>Assertive:</u> An assertive communicator clearly expresses his needs, wants and opinions in a way which is considerate of others.</p>
<p><u>Passive Aggressive:</u> A passive aggressive communicator indirectly makes sure that others are aware of his needs, wants and opinions and feels that these are more important than his.</p>	<p><u>Passive:</u> A passive communicator does not express his needs, wants and opinions directly. He put others' needs above his own.</p>



DISCUSS

What kind of communicator do you think you are?

Talking to Customers

While working in customer service, you will talk to customers on a daily basis. You may speak to customers face-to-face, over the telephone, or through an online chat. Regardless of which communication method you are using, it is recommended that you follow these basic rules for talking to customers:

1. Be polite and courteous.
2. Avoid using jargon.
3. Use positive and non-judgmental language. Avoid negative language.
4. Be sensitive.
5. Never answer a question with a question.
6. Be cautious with humour.
7. Try to hear yourself as customers hear you.
8. Paraphrase or summarize when needed. Avoid repeating exactly the same statement.
9. If you don't understand, politely ask the client to repeat themselves.



ACTIVITY

For each statement/question below discuss and record a more polite and friendly response to be used when speaking to customers.

Wrong Approach	Polite & Friendly Alternative
I don't know.	
No.	
That's not my job.	
That's not my fault.	
Calm down.	
I'm busy right now.	
Call me back later.	

Speaking Clearly

Being able to speak clearly is a key skill for customer service. It is a skill you can learn and improve on with practice. When you are speaking to a customer, keep the following tips in mind:



1. Take a deep breath to calm yourself before you start to speak.
2. Speak slowly. We often speak fast when we are nervous or in a new situation.
3. Use proper grammar when you speak, avoid slang, and never swear.
4. Think about what you are going to say before you speak.
5. Keep it simple and to the point.
6. Open your mouth bigger when you are speaking. This helps express your voice.
7. Ask if the other person understands what you are saying. If not, rephrase.

Initial Greetings

Customers should always be greeted promptly. Promptly means with little or no delay, or immediately. The meaning of promptly will vary for different customer service settings.



For example:

- a) If you are answering a phone, you will be greeting that customer immediately.
- b) In a retail setting you will greet the customer when the customer enters the store.
- c) At a checkout, you will greet the customer as soon as the current customer leaves and the next customer approaches.
- d) In any business setting you are front line staff for, you will greet the customer as they approach the front desk, or enter the facility.

Front line staff is staff who are the first point of contact for a customer entering a business/facility

Having a variety of standard greetings “ready to use” is a good strategy.



ACTIVITY

As a group, make a list of some standard greetings you could use as a customer service employee.

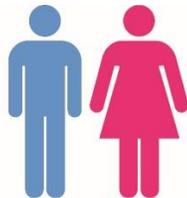
Terms of Address

When you first greet someone and you don't know his or her name, the most common polite titles to use are, sir, ma'am, or miss. Sir is used to address males. Ma'am and Miss are used to address females.

The decision for using Ma'am or Miss is not clear cut. Typically, you would use the term Ma'am if you know the customer is married, middle-aged, or older. The term Miss is used for girls and younger, unmarried women.

Because there is not a set rule and people can look older or younger than they really are, the term Miss will often be used so as not to offend the customer.

If you are going to be assisting a customer more than once or for a longer period of time, you can simply ask how he/she would like to be addressed.



Gender Pronouns

Gender pronouns identify a person's gender in the third person. Traditionally they were categorized as masculine (he/him/his) and feminine (she/her/hers). This separation is known as gender binary and only recognizes women and men.

Many people identify as non-binary. Therefore, gender neutral pronouns should be used. Below is a list of gender binary and non-binary pronouns.

Subject	Object	Possessive	Pronunciation
She	Her	Hers	Shee, hur, hurs
He	Him	His	Hee, him, hiz
They	Them	Theirs	Thei, them, thehrz
Xe	Xem	Xyrs	Zee, zem, zeres
Ze	Hir	Hirs	Zee, here, heres
Ze	Zir	Zirs	Zee, zere, zeres

When communicating with a customer, use gender inclusive communication. When you are not sure what pronoun a person uses, ask their name, or how they would like to be addressed.

To avoid making a mistake, and to be inclusive, avoid using titles or pronouns when possible. When greeting or approaching a customer you can use phrases such as:

- Hello
- Good Morning
- Welcome
- Excuse me

Telephone Communication

Listening and paying attention are even harder to do when you're communicating over the phone. There is a greater chance of distraction because you are not face to face with the customer. There are some simple steps you can take to ensure you are giving the customer your complete attention:



1. Do not have unnecessary papers on your desk. You might be tempted to read them instead of listening to the customer.
2. Make sure you have a quiet workspace, if possible, so you are not distracted by other staff members.
3. Use a comfortable headset with appropriate volume so you can hear the customer.
4. If there is a bad connection, ask the customer if there is a different number you can reach them at, or a better time to call back.

When a customer calls, your voice represents the whole business. How you handle the call can win them over, or send them in search of another company. The caller needs you to be effective and efficient. The caller will rely on what they hear to form an impression of you and your company. Your tone of voice, manners, word usage and speech patterns all play a role in helping the caller form an opinion of you. Therefore, you will want to:

- Be courteous and pleasant
- Sound interested
- Use an appropriate volume
- Emphasize appropriate words
- Speak slowly
- Speak in a calm voice
- Pause when giving information
- Keep your pitch low



VIDEO:

Watch the videos, “If Call Center Employees Were Honest” and discuss.

https://www.youtube.com/watch?v=dMqGr4A_0E0&feature=youtu.be

Written Communication

There are various forms of written communication you may use as a customer service representative. Some of these may include:

- Customer service policies
- Workplace information
- Rain checks
- Customer comment cards & feedback surveys
- Letters/emails
- Gift certificates
- Schedules
- Signage, flyers, advertisements

Customer Service Policies

Written documents that outline the protocol that employees must follow when they deal with customers. They generally include a company's service ethics and operating procedures.



ACTIVITY

Review the customer service policy on the following page and discuss as a group. Do you agree? Do you think anything is missing?

Customer Service Charter

At CareerLink Employment Centre, we commit to:

- Assist individuals to identify and reach their employment goals, make informed career choices and approach their job search with focus and confidence
- Offer supportive services to employers and assist them to meet their staffing needs
- Provide a confidential, timely, individualized and accessible service with knowledgeable professionals who are courteous and approachable

We believe in:

- Providing the highest quality of customer service
- Offering flexibility of service that is responsive to community need
- Providing current employment, education and training resources
- Clarifying program eligibility criteria and application processes
- Making appropriate referrals to other services and programs
- Empowering individuals to take charge of their own career path

Your comments and suggestions for the development of our services are important to all of us at *CareerLink*. We need to involve you to reach the highest possible standard of service. Please take a few moments to provide feedback on our services by filling out a confidential questionnaire, or emailing us your thoughts to careerlink@granderie.ca.

We value your opinion and are committed to hearing from you. We will respond to your questions, comments and concerns. Please let us know what you are thinking.

Workplace Information

Workplace information may include manuals that provide directions and instructions for completing specific tasks. Your ability to read and understand directions in the workplace are important to ensure your safety and success on the job.

When reading directions or instructions follow these steps:

- a) Read all steps before doing anything.
- b) Make sure you understand what you need to do in each step. If you don't understand something, make sure to ask for help.
- c) Re-read step 1 and do what the step tells you to do.
- d) Read and follow step 2. Continue to follow each step until the task is completed.



ACTIVITY

Read the warehouse storage guidelines below and answer the questions that follow.

WAREHOUSE STORAGE GUIDELINES

There are 5 main storage areas: refrigerated, frozen, cans and bottles, packages and boxes, and non-food items.

- Fresh flowers are stored in the refrigerated area
- Plants are stored with packages and boxes
- All produce is stored in the refrigerated area
- Personal care items are stored with non-food items
- Foods with short-term expiration dates are stored with packages and boxes

1. Where should you store a box with frozen chicken parts?

2. Where should you store a box with bagels and muffins? The box has an expiration date 10 days from today's date.

3. Where should you store 3 boxes of plants?

4. Where should you store boxes of cleaner?

Rain Checks

A rain check is a coupon issued to a customer by a store, guaranteeing that a sale item that is out of stock may be purchased by that customer at a later date at the same reduced price.

Rain checks are usually printed out from a computer system today, but some stores still use a hand written version.



ACTIVITY

Fill in the rain check below using the following information:

The customer would like 3 five pound bags of Sunnydale Yukon gold potatoes. The regular price is \$2.99. The sale price is \$1.99.

ABC Company	This rain check entitles you to purchase the item at the listed sale price when the item is back in stock. We apologize for any inconvenience.
Date:	
Item:	
Quantity:	
Regular Price:	
Sale Price:	
Authorized by:	

Customer Comment Cards & Feedback Surveys

Comment cards are brief surveys that allow customers to rate their experiences. They are often used in restaurants and given to customers when they receive their bill. Retail organizations often include a web link on their receipts that customers can access to provide feedback.

Sometimes an incentive may be offered to encourage customers to complete the surveys.



DISCUSS

Have you completed a feedback survey after making a purchase? What is your opinion on these surveys? What would you do differently if you could make the survey questions?

Letters/Emails

When customer questions or complaints are received they need to be addressed as quickly as possible. Today, these responses are more commonly done via email.

Email Etiquette

Etiquette is a code of behaviour that defines expectations for social behaviour according to conventional norms within a group. When writing an email in a professional setting, it is important to follow some standard etiquette expectations.

DOs	DON'Ts
Use a clear subject line	Don't use "hey" or "yo"
Use a signature that includes contact information	Don't use humor
Use a professional salutation	Don't assume the recipient knows what you are talking about
Proofread your message	Don't send angry email, re-read your message at a later time before sending it
Keep private material confidential	Don't overuse exclamation points
Use a professional valediction	Don't use private or confidential information in the subject line

Salutation: A gesture, or greeting used to address the person you are sending the email to.

Valediction: A gesture or statement made at the end of an email to say goodbye.

Can you think of some examples of professional salutations and valedictions?



ACTIVITY

1. Circle or highlight the professional email faux pas in the email below:

 Send	To...	customer@walmart.ca
	Cc...	
	Subject	product question

Hey!!!

Got your email about the coffee maker. I didn't really understand what you're asking, but we sell like lots of coffee makers. IDK maybe you can check the website!!! If you can't find info on the website another customer bought a coffee maker recently. Her email address is kate@gmail.com

Good luck!!!!!!
ttyl

2. Re-write the body of the email on the previous page using proper professional email etiquette.

Gift Certificates

Some establishments still use hand written gift certificates. You may be required to fill gift certificates out when a customer would like to purchase one. You will need to use your best penmanship and spelling skills. It is also important to review all details on the gift certificate to make sure the accurate information is documented.



Schedules

You will be responsible for reading your own work schedule. As well, you may be responsible for reading rotating schedules for specific tasks or duties. For example, if you work in a fast food restaurant the task of cleaning bathrooms, or taking out garbage, may be a rotating task.



ACTIVITY

Review the schedule below and answer the questions that follow.

KITCHEN SCHEDULE								
WEEK OF								
POSITION	NAME	MON	TUES	WED	THURS	FRI	SAT	SUN
Baker	Ngomi		6:30-3	7-3	6:30-3	7-3	6:30-3	
Grill cook	Sandra	7-3	7-3	7-3			7-3	7-3
Grill cook	Alphonse	5-12pm	5-12pm	5-12pm	4-12pm			12-9pm
Grill/veg prep	Harry			6:30-3 (vp)	7-4 (G)	7-3(G)	6-3 (call)	6-3 (call)
Veg prep	Vinh	7-3	7-3			7-3	7-3	7-3
Salad prep	Candice			7-3	7-3	7-3	7-3	7-3
Saucier	Peter	7-3	6:30-3	7-3	6:30-3			7-3
Lounge cook	Lupe			10-6	10-6	10-6	10-6	10-6
Lounge cook	Fred	10-6	10-6	6-12pm	6-12pm	6-12pm		
Lounge cook	Sylvia	6-12pm	6-12pm			6-12pm	6-12pm	6-12pm
Appetizers	Sally	5-12pm				5-12pm		
Appetizers	Meredith			5-12pm			5-12pm	
Appetizers	Walter		5-12pm		5-12pm			
Salads/ Appetizers	Alexis	3-11pm (S)	3-11pm (S)			3-11pm (A)	3-11pm (A)	3-11pm (S)
Salads	Marcus	5-12pm	5-12pm	3-11pm	3-11pm			5-12pm
Dishwasher	Meilio	6-12pm	6-12pm	6-12pm	6-12pm			6-12pm
Dishwasher	Susan					6-12pm	6-12pm	
Dishwasher	Andrei					6-12pm	6-12pm	
Dishwasher	Lynn	10-6	10-6	10-6	10-6	10-6		
Dishwasher	James						10-6	10-6

1. Who is responsible for salad prep on this schedule?
2. How many hours will Sally work this week?
3. How many dishwashers are there on this schedule?
4. What shift does the veg prep person work during this schedule?
5. On Saturday, what shift does Lupe work?
6. In total, how many hours does Lynn work during this week?

Signage, Flyers & Advertisements

When working in customer service, it is a good idea to be aware of and familiar with all signage, flyers, and advertisements that are circulated by your employer. These marketing materials are a way for your business to communicate with potential customers. Customers may ask questions about these marketing materials, or present them to you to redeem discounts, prizes, or more information.



REVIEW:

Review the advertisement on the following page and discuss the important features.

THURSDAY, FEBRUARY 27

Seniors' Bonus Day

SAVINGS + BONUS CARD

Save **20%**

with a PC Optimum card on almost all regular priced merchandise.*

Get a FREE **\$10** Shoppers Drug Mart Bonus Card with a purchase of \$40 or more on almost anything in the store.**

**See page 6 for details.

SUNDAY, FEBRUARY 23 AND MONDAY, FEBRUARY 24

GET A \$20

ULTIMATE DINING PROMO CARD WHEN YOU SPEND \$75 OR MORE ON ALMOST ANYTHING IN THE STORE.*

THE ULTIMATE SHOP & DINE DEAL

*See page 9 for details.

6 DAYS OF SAVINGS SATURDAY, FEBRUARY 22 TO THURSDAY, FEBRUARY 27

Up to 40% off*

JAMIESON
NATURAL HEALTH PRODUCTS
Selected Types & Sizes

2.99 each

DIPPITY-DO
HAIR GEL (350mL),
FRUCTIS or **DOVE**
HAIR CARE PRODUCTS
Selected Types & Sizes

18 Pack

5.28 each

COCA-COLA
or **PEPSI**
BEVERAGES 18 x 355mL
Selected Types

Milestone 3

We have now practiced various forms of communication that you may use in a customer service setting. Complete milestone 3: Read an information sheet. Successfully completing this milestone will confirm your ability to extract information from written communication effectively.

Your task is to read the company information on page 3 and answer the questions on pages 4 – 5.

When you have completed the activity, make sure your name and today's date are on all required pages and hand the complete milestone to your facilitator.



SESSION 4

In this session you will develop the following skills for success:

Adaptability	You will practice your ability to adjust your behaviour when interacting with customers to meet their needs.
Collaboration	You will work collectively with your classmates to complete task based activities with a mutual goal.
Communication	You will share and receive information to enhance your ability to sell products and services to customers.
Digital	Use technology to research various products or services one may need to sell.
Creativity & Innovation	You will practice your ability to develop and apply sales techniques when interacting with customers.
Problem Solving	You will practice your ability to identify, work through and solve problems while attempting to sell goods and services to customers.
Reading	You will find, read and understand information from various sources.
Writing	You will practice your writing skills while using a variety of methods to share information.

Sales

You may choose to work in a customer service position that requires you to convince a customer to purchase a product or service. Being able to sell someone a product or service while maintaining excellent customer service is a great skill so have.



DISCUSS

As a group, make a list of jobs that require you to use sales skills.

There are many factors involved in being a good sales person. Some of them include:

- a) *Confidence*: You need to be confident in yourself and the product or service you are offering.
- b) *Ability to maintain focus*: You need to remember you are trying to sell something and not get off track chatting with customers about other topics.
- c) *Strong communication skills*: You need to be able to recognize the customer's needs and present your information clearly and effectively.
- d) *Creativity*: You have to be able to pivot when a sales pitch isn't going as planned. Always be ready with alternative offers if they are not interested in the original.
- e) *Persistence*: Don't give up at the first sign of difficulty. Not every customer interaction will end in a sale.



VIDEO:

Watch the video clip, "Sales Techniques – How to Convince a Customer to Buy From You". Discuss the techniques as a group.

<https://youtu.be/3oEv13ZYLiq>



DISCUSS

Can you think of an example of when the 3 box technique is being used? Do you think you have ever purchased something because a person or company used the 3 box technique and it worked?

Customer Relationships

If you are working in sales, it is important to develop rapport with your customers. You want them to trust you. Some things you can do to develop a good rapport with your customer are:

- Make a good first impression
- Respect their budget
- Adjust your approach to accommodate the customer’s needs and wants
- Find common ground
- Practice active listening
- Stay engaged
- React to inquiries

If you are working with a customer who can’t decide, make sure to provide contact information so you can be reached if they have further questions or choose to return.

Building a strong customer relationship will help customers feel connected with your brand or company. It can lead to customer retention.



VIDEO:

Watch the video clip, “Sales Lessons From The Office – How Dunder Mifflin Stayed in Business”. Discuss this sales interactions. What was done correctly and incorrectly?

<https://youtu.be/h-zUZwC8jew>

Upselling & Purchase Add-ons

As a customer service employee, one of your tasks may be to sell the customer additional products or services. For example, if you are working in a big box store that has its own credit card, you may have to ask each customer if they would like to apply for the credit card while they are checking out.



DISCUSS

Can you think of other situations when you might be responsible for selling additional products or services?



ACTIVITY

Create a sales pitch to try to sell your classmates a specific product or service. You will be given time to research the product or service and develop a plan. You will then take turns presenting your product to the class. When you are a member of the audience, you are encouraged to ask the presenter questions about their product or service. When everyone has presented, the class will anonymously vote on which product they would choose to purchase based on the sales pitches.

SESSION 5

In this session you will develop the following skills for success:

Adaptability	You will practice your ability to adjust your behaviour when solving workplace problems and dealing with stress.
Collaboration	You will work collectively with your classmates to complete task based activities and solve workplace problems with a mutual goal.
Communication	You will share and receive information both verbally and written to enhance your ability to serve customers.
Creativity & Innovation	You will practice your ability to develop and apply problem solving techniques when working in a customer service role.
Problem Solving	You will practice your ability to identify, work through and solve problems in a customer service work setting.
Reading	You will find, read and understand information from various sources.
Writing	You will practice your writing skills while using a variety of methods to share information.

Problem Solving

Problem solving is a skill we use every day, both in our personal lives and at work. As a customer service employee you will have to solve problems on a daily basis.

E.g. A staff member calls in sick and has to be replaced or that staff member's workload has to be distributed

E.g. Your organization has run out of a specific supply that is needed for that day.

Problem solving is the process of working through a problem to find a solution. When we are trying to solve a problem, sometimes barriers get in the way. These barriers may include:

- Emotions
- Fear & anxiety
- Different learning styles



Emotions: Controlling your emotions can be very difficult when you are faced with a problem. In order to solve problems, you need to be able to think clearly and try not to let your emotions get in the way.

Fear & Anxiety: Many people think they cannot problem solve so they avoid it. Everyone has the ability to solve problems, you just need to build your skills so you can do so effectively.

Different Learning Styles: The way someone learns will impact how they solve a problem. If you don't understand your learning style, it can be a roadblock to being able to solve problems.

Problems can come in many shapes and forms. We are constantly solving problems. Some may be everyday problems, such as what to have for dinner, or how you are going to get to work. Other problems may be more complex. For example, how to change from a job you don't like to a career you have always dreamed about.



ACTIVITY

Make 2 lists of all the problems you think you have right now or might have in the future:

<u>Everyday Problems</u>	<u>Complex Problems</u>

Good problem solvers do 6 things:

1. Focus on the solution, not the problem.
2. Keep an open mind – consider all possible solutions.
3. View problems neutrally instead of as scary things.
4. Think laterally – change the direction of your thoughts and look at things in a new way.
5. Use positive language.
6. Simplify things – look for the obvious solution instead of making things more complicated.

When you come across a problem, follow these 6 steps:

1. Identify the problem.
2. Think about it.
3. Brainstorm solutions.
4. Select the best solution.
5. Implement the solution.
6. Evaluate the solution.



ACTIVITY

Think of a problem you may encounter while working as a customer service employee.

Problem: _____



Share your potential problem with the group. Choose one problem to work on as a group.

Now let's complete the 6 problem solving steps:

Step 1	Identify the problem	
Step 2	Think about it	
Step 3	Brainstorm solutions	
Step 4	Select the best solution	
Step 5	Implement the solution	
Step 6	Evaluate the solution	

Dealing with Conflict

There are many different situations you will encounter in customer service occupations that will be challenging. For example...

- When you don't know the answer to a question.
- When an item a customer wants is not available.
- When you have to transfer a customer to a different department.
- When a product is defective.
- When a customer is angry.

When difficult situations arise, using positive language is important. When something goes wrong customers expect:

- a) That you deal with them being upset
- b) That you apologize
- c) That you don't become defensive
- d) That you act quickly to solve their problem



ACTIVITY

Using the chart below, discuss and record improved phrases that could replace the commonly used phrases listed in the left hand column.

Commonly Used Phrases	Improved Phrases
Why didn't you bring your receipt?	
I'm really busy right now.	
Can you call back tomorrow?	
Calm down.	
There's no one who can help you here today.	
We can't do that.	

Sometimes, regardless of how hard you try, customers will still be angry. If you encounter this situation, there are 6 steps you can follow to help you manage another person's anger.

1. Let the person vent, and encourage him/her to talk.
2. Listen without interrupting.
3. Listen for the break; a breath, a change in tone, lowering of voice, a pause.
4. Then recap, to ensure you understand the issue.
5. Confirm with the customer that you understand the problem and ask them if there is anything else you can help them with.
6. Begin to problem solve.



Stress Management

Stress is a state of mental or emotional strain or tension resulting from adverse or very demanding circumstances.



DISCUSSION

Why do you think it might be easy to feel stress as a customer service employee?



ACTIVITY

Do you think you are stressed? Use a web browser to search for an online stress test and complete the test.



DISCUSSION

What are some things we can do to reduce stress in our lives?



ACTIVITY

Create a stress reducer ring to keep with you at work or at home. When you are feeling stressed, get out your reminder ring and decide which tip will help you in that specific situation.



Team Work

In the customer service field, you will work with a variety of people. Depending on the setting you choose to work in, you may need to work with:

- Managers/supervisors
- Nurses/doctors
- Mechanics
- Retail associates
- Spa staff



Teamwork is a key skill that is required in most job descriptions. It is a skill that must be used on a regular basis. You must be able to get along with others, whether they are co-workers or superiors. When you work well with others, productivity and workplace morale improve.



DISCUSS

Teams have a common goal. When working as a customer service employee, what will the common goal(s) be for yourself and your teammates?



VIDEO

Watch the video and discuss what each team does well and what they could have done better.

https://youtu.be/hf3C5rci_z4

	WHAT THEY DID WELL	WHAT THEY COULD HAVE DONE BETTER
Team # 1		
Team # 2		
Team # 3		

Being a good team member can include the following:

- Committing to a common goal or task
- Supporting your team members
- Show that you respect your team members
- Encourage your team members and praise their accomplishments
- Respect individual differences
- Be flexible
- Be positive



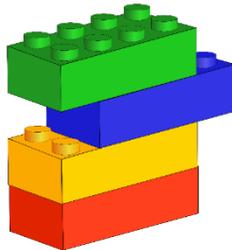
DISCUSS

If you had to work with a team member who wasn't pulling their weight, how would you handle the situation?



GROUP ACTIVITY

Form groups of 3. Each group is given the same number of Lego pieces. You have 10 minutes to build the tallest freestanding structure you can. The team that creates the tallest freestanding structure wins.



Challenge: Try the activity again, but you cannot speak to your team members.

Work Ethic

Work ethic is defined as the principle that hard work is valued/important or worthy of reward.

A strong work ethic is desired by employers in all occupations. It is an important part of being successful in your career.



DISCUSS

How do you think employees can display strong work ethic?



ACTIVITY

As a group, make a list of unethical behaviours in the workplace you have experienced or witnessed.



VIDEO:

Watch the video clip, “The Office – Business Ethics” and discuss as a group what disciplinary action should be taken, if any for the behaviour discussed in the clip.

<https://youtu.be/-wR2huzk4HQ>

Confidentiality

Confidentiality is defined as the state of keeping or being kept secret or private.



DISCUSS

How do you define confidentiality?



DISCUSS

Why is confidentiality important in your occupation as a customer service worker?



SCENARIO PRACTICE

You are at the grocery store when you run in to a friend you haven't seen since you started your new job as a call centre customer service representative. You tell your friend about your new job. He then says, "oh, I think my neighbour Jim Smith has an account with that company, does he pay his bills on time?"

How do you respond?



SCENARIO PRACTICE

You are working in a clothing store as a retail associate. While you are checking a customer out she asks you to tell her the name of the customer who just left as she thinks she went to high school with her.

How do you respond?

Technology Confidentiality

In today's society, technology is being used to communicate with others in a variety of ways. While working in the customer service field you may be required to communicate with customers, or other employees, as well as many others. When doing so, you must always consider confidentiality. You may want to ask yourself:

Who am I allowed to discuss this with?

What information am I allowed to send via email?

If you are unsure, speak to your employer for clarification. It's important to make sure you have read and understand all confidentiality and privacy policies provided by your employer.



Avoiding Illness

As a customer service employee, you will come in to contact with germs on a regular basis. It is important for you to take care of yourself in order to avoid illness. Below is a list of tips to help you stay healthy:

- WASH YOUR HANDS frequently
- Encourage others to wash their hands frequently
- Don't touch your face
- Ensure your immunizations are up to date
- Get a flu shot
- Practice healthy eating habits
- Exercise on a regular basis
- Ensure you are getting proper sleep

Hand Washing

Hand washing will be an important task throughout your workday if you want to avoid illness. There are 5 steps involved in proper hand washing:

1. Wet
2. Lather
3. Scrub
4. Rinse
5. Dry



VIDEO

Watch the video "Fight Germs. Wash Your Hands!"

<https://youtu.be/eZw4Ga3jq3E>

Professional Image

Your professional image is how you are perceived by others. Different things will make up this professional image. Your personal hygiene and what you wear, will contribute to this image.

Personal Hygiene

At any place of employment, it will be expected that you maintain good personal hygiene and grooming. This includes, but is not limited to:

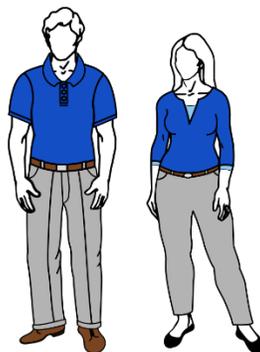
- Showering/bathing on a daily basis
- Brushing your teeth daily
- Washing hair with shampoo at least twice a week
- Washing your clothes after they have been worn
- Wearing clean clothes to work every day
- Washing your hands after using the bathroom



Maintaining good personal hygiene will contribute to your positive professional image.

Dressing Appropriately

The clothing you choose to wear or how you wear your clothing can affect how a customer perceives you. If your clothing is sloppy or dirty, it will appear that you do not care about yourself or the job. If your clothes are clean, neat and professional, you are projecting that you take pride in your job.





ACTIVITY

Using the list below, decide if you agree or disagree with each statement. Discuss as a group, why you agree or disagree.

Statement	Agree	Disagree
Wear flip flops or dirty running shoes		
Wear shorts		
Cover your tattoos		
Wear blue jeans		
Wear perfume or cologne		
Take out your body rings		
Wear pants that are low or very tight		
Chew gum		
Wear casual business attire		
Keep your nails clean and neatly manicured		
Use your cell phone to text or make a phone call		
Have coffee, pop or food with you		
Have undergarments visible (bra straps, boxers, etc.)		
Keep your cell phone on vibrate		
Check to make sure your clothes are wrinkle free		
Wear lots of make-up		
Wear a ball cap		

SESSION 6

In this session you will develop the following skills for success:

Adaptability	You will practice your ability to adapt to changes in technology while working in a customer service role.
Collaboration	You will work collectively with your classmates to complete task based activities with a mutual goal.
Communication	You will share and receive information both verbally and written about technology in a customer service setting.
Digital	You will practice your digital skills while learning about technology in a customer service setting.
Problem Solving	You will practice your ability to identify, work through and solve problems while learning about technology in customer service settings.
Reading	You will find, read and understand information from various sources.
Writing	You will practice your writing skills while using a variety of methods to share information.

Customer Service Technology

Technology in a customer service setting is becoming increasingly more important. It can help increase the speed of customer interactions and satisfaction, allowing customer service representatives to serve more customers in a shorter amount of time. There are many different technologies used in customer service jobs. You could encounter a variety of them.

Point of Sale (POS) Systems

The point of sale occurs when a sale transaction is completed. It is the point at which a customer makes a payment to the merchant in exchange for goods or services. A variety of technology could be used during the POS.



ACTIVITY

Using the internet to research, complete the chart below to learn more about specific parts of a point of a sale system.

Part of POS System	Purpose
Debit/Credit Machine	
Scanner	
Cash Register	
Tablet/Phone POS Systems	



DISCUSS

As a group, discuss the different types of businesses or organizations the various kinds of POS systems might be used at. For example, which kind of POS system would be used at a large corporation in comparison to a small local business?

Phone Queue Systems

A phone queue system is an add-on to a multiline phone system that allows calls to remain on hold until a phone agent is ready to handle the call. The caller in the queue system experiences a wait, and agents fielding calls receive them one at a time.

- Sometimes the agents can see how many calls are on hold and how long each call has been on hold.
- Many phone queue systems integrate with company computer systems, allowing agents to conduct retail business or other processing, tracking that data along with information about the nature of the phone calls.
- Phone queue systems are also called Automatic Call Distributors (ACDs).



Interactive Voice Response System (IVR)

An interactive voice response system (IVR) asks customers to press a button on their telephone key pad to select which service they want. The technology then routes the call to the most appropriate agent to handle the enquiry. Alternatively, it can ask the customers to use their own telephone keypad to key information that will help the agent to validate who they are. For example, account numbers.

Email

Using an email system might be an important task on a daily basis when working in a customer service setting. It is essential that you are familiar with common email features.



ACTIVITY

Log into your email account and follow along as we begin to review the common features of an email account.

Inbox

When you log in to any email account, you will automatically be in your inbox. The inbox is a folder where unread and read emails are stored that you have not deleted, or moved to another folder. Emails that have been read, will usually stand out somehow, whether it is bold, or highlighted a different colour.

Sent

After you have sent an email, it will automatically be stored in the sent folder.

Spam/Junk

Emails such as advertisements, that your email account blocks are stored here.

Trash/Deleted

Emails that you have deleted are stored here.

Drafts

Emails you are working on are stored in this folder.

Folders

In any email account, you can create folders to organize your emails. In Gmail, folders are called “labels”.



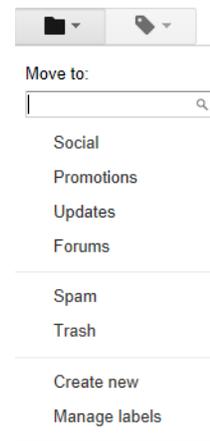
ACTIVITY

Follow the steps below to create a new label/folder in your email account.

1. You will see a link in the list at the left of your screen called “create new label” or “new folder”. Click on this link. If you cannot see this link, let your facilitator know.
2. Name your label/folder “test”.

Adding Emails to a Label/Folder

1. Open an email from your inbox.
2. You will see an icon that looks like a file folder, when you hover your cursor over the icon it will say, “move to”.



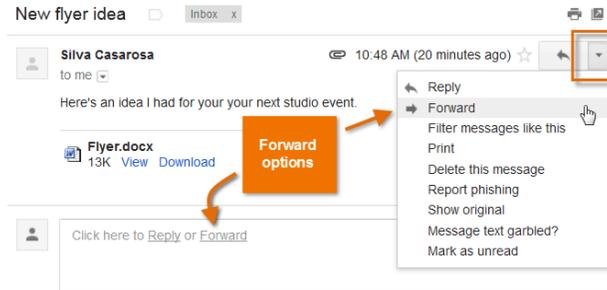
3. When you click on the icon, you will see a list of possible labels/folders.
4. Select the label/folder you wish to store your current email in.

Replying to an Email

When you open an email, you have the option to:

- *Reply*: Send a message back to the person who sent you the current email.
- *Reply All*: If the email was sent to yourself AND others, when you reply to all, everyone who received the original email, will also receive your reply.
- *Forward*: The forward feature can be used to send an email you received to a different email address, or several other email addresses.
- *Delete*: Deletes the email and sends it to your trash can.

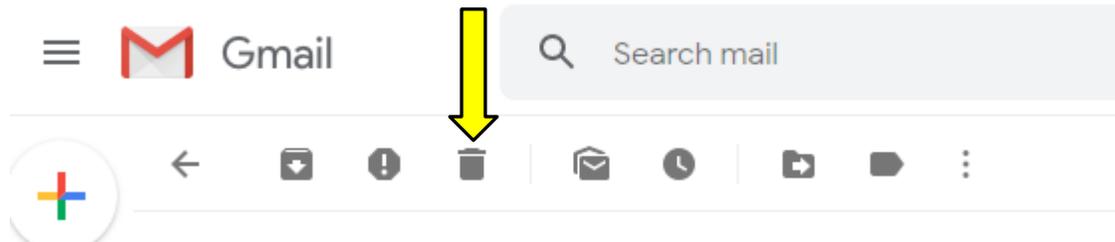




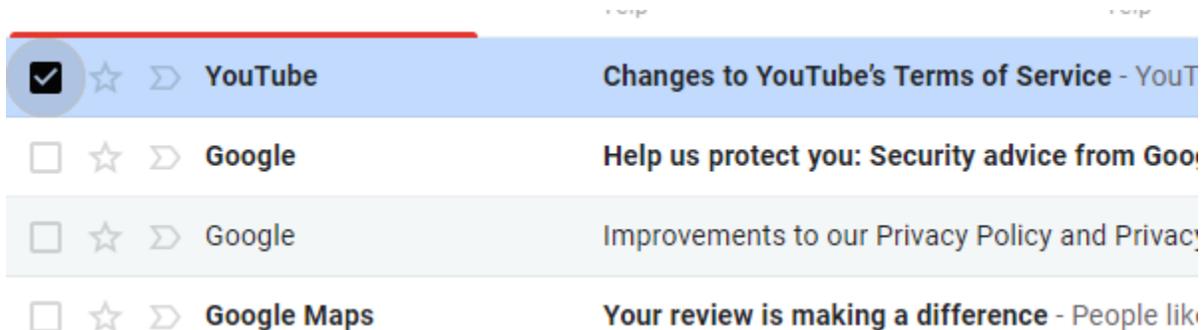
Deleting an Email

There are 2 ways to delete a single email.

1. Open the email, then click on the trash can icon.



2. From your inbox list, click the box to the left of the email you wish to delete. Then, click on the trash can icon, as seen in the image above.



If you wish to delete more than one email at a time, this can be done when viewing your inbox. You can click as many of the boxes to the left of the emails as you wish. Then click on the trash can icon.

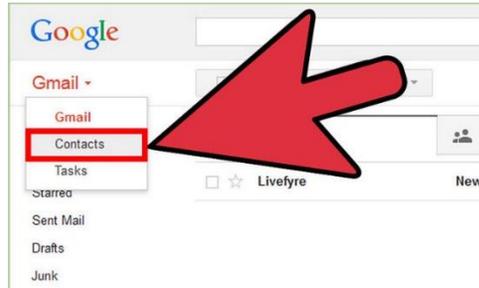
Contacts / Address Book

All email accounts allow you to save people’s email addresses in either a contacts folder or an address book.



ACTIVITY

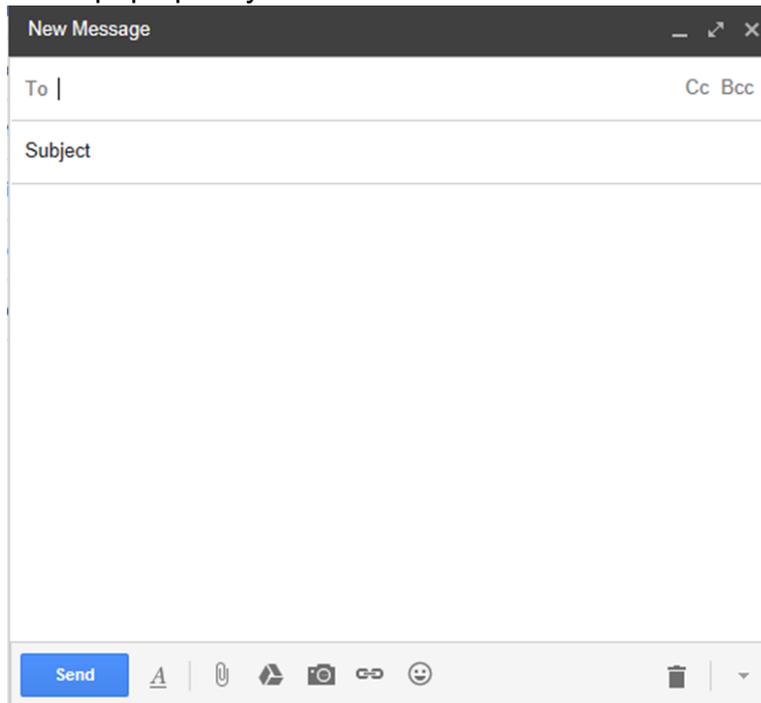
Locate the contacts folder, or address book and complete the steps below.



1. Click on the link called “new”, or “add”, or “new contact”.
2. Add your facilitator’s email address to your address book

Sending Email

To create a new email, you need to click on a link labeled “new” or “compose” or “create”. A window will pop up on your screen.



TO: This is where you will need to type the person’s email address.

- Some email accounts will allow you to start typing the address or person's name and the remainder of the contact will show up for you.
- Some email accounts will require you to use your contacts folder or address book to find the address.
- You can enter more than one person's name.

CC: CARBON COPY: This is used when you want a copy of your email sent to another recipient, usually as a FYI.

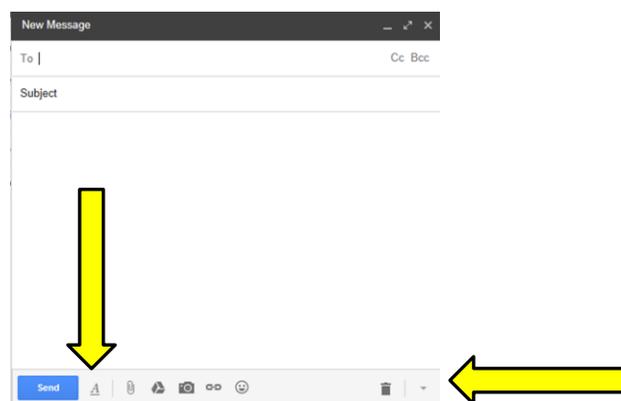
BCC: BLANK CARBON COPY: When a copy of an email message is sent to a recipient whose email address does not appear in the message.

- The person in the TO box will not know that the person in the BCC box is also getting the email.

SUBJECT: Gives the recipient an idea of what your email is about.

- Only needs to be a few words.
- Example: customer service position.

Once you have filled in the TO box and the subject, you can type the body of your message. When you have finished typing your message, you can use features similar to those in MS Word, such as bold, underline, font size, etc. by clicking on the A at the bottom of the message box. You can also use spell check by clicking on the downward facing arrow in the bottom right corner of the message box.



Attaching a File

Sometimes you may want to attach a file to an email. For example, employers are now requiring applicants to apply for jobs by emailing their resume and/or cover letter.



ACTIVITY

Attach a file to your email by following the steps below.

1. Locate the link for attaching a file. It is usually symbolized by a paperclip, or the word “attach” or “insert”. Click on the link.
 - a. If you have a Hotmail or Outlook account, you may have an extra step. Once you have clicked the paperclip, you must select “files as attachments”.



2. A dialogue box will appear allowing you to search for the file you would like to attach.
 - a. When you have found the file you would like to attach you can double click or left click once on the file and then left click once on “open”.
3. Somewhere on your email, it will indicate that your file has been attached. Your facilitator will come around and show you on your screens individually.
4. When you are ready and have double checked everything, you can click send.



ACTIVITY

Use a Google search engine to find a picture of a computer. Save the picture. Send the picture to your facilitator’s email.

SESSION 7

In this session you will develop the following skills for success:

Collaboration	You will work collectively with your classmates to complete task based activities with a mutual goal.
Communication	You will share and receive information both verbally and written to enhance your ability to work with numbers in a customer service role.
Numeracy	You will practice your ability to work with numbers in a customer service role.
Problem Solving	You will practice your ability to identify, work through and solve numeracy problems in a customer service role.
Reading	You will find, read and understand information from various sources.
Writing	You will practice your writing skills while using a variety of methods to share information.

Numeracy Skills

Numeracy skills is the ability to work with numbers. Numeracy skills can be an important part of a customer service job.



ACTIVITY

Read the scenarios below and decide if the employees need to use numeracy skills to complete a task.

Scenario 1: Tammy is a receptionist at a busy dental office. She likes to arrive 10 minutes before her shifts starts. Her shift starts at 8:00am. It usually takes her 30 minutes to drive to work. Tomorrow she has to take the bus to work because her car is in the shop. The bus stop is a 5 minute walk from her home. The bus trip will take 45 minutes. Tammy has to decide what time to leave her home in the morning.

Does Tammy need to use numeracy skills to complete this task?

Scenario 2: John works in a gift shop. Today he has to wrap 6 gifts using red ribbon. He needs 2 feet of ribbon for each gift. A roll of red ribbon is 12 feet. John needs to decide how many rolls of ribbon he will need.

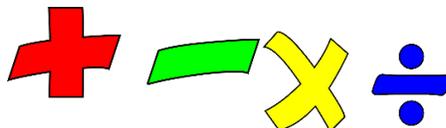
Does John need to use numeracy skills to complete this task?

Scenario 3: Oscar is an office assistant at a large hotel chain. His supervisor wants him to make 50 copies of a report. The report is 12 pages long. The paper tray in the photocopier holds 500 sheets of paper. Oscar needs to decide if he will need to refill the paper tray to finish the job.

Does Oscar need to use numeracy skills to complete this task?

You may be required to use basic numeracy skills, such as adding, subtracting, multiplication, or division in a customer service role. It is important that your numeracy skills are sufficient.

Complete the activities on the following page **WITHOUT A CALCULATOR**. This will help you determine whether or not you need to upgrade your basic numeracy skills.



1. Susan spent 3 hours in class on Monday. She spent 4 hours in class on Tuesday. She spent 6 hours in class on Thursday. How many hours did she spend in class altogether?
2. David was doing inventory. He counted 79 basketballs. The last time he did inventory there were 104 basketballs. How many basketballs have been sold since the last time David did inventory?
3. The blood donor clinic had a 15-day sign up period. Each day, 25 people signed up to donate blood. How many people signed up in all?
4. Jim Simmons makes \$7,680 a year at his part-time job. He gets paid by the month. How much does he make each month?
5. There are 542 patients admitted in the hospital. There are 302 female patients. How many patients are male?
6. Maria earned \$22,984 last year. She spent \$19,487 on taxes, rent, food, and other things. She saved the rest of the money. How much did she save?
7. Doug pays \$61 every month for health insurance. How much does he pay in a year?
8. On Saturday, Pam had to do her week's shopping. She spent \$58.87 at the grocery store, \$13.62 at the hardware store, \$7.52 at the drugstore, \$18.35 at the department store, and \$48.44 at the shoe store. How much did she spend altogether?
9. Alex jogs 6 kilometers an hour. He jogged 36 kilometers last week. How many hours did he jog?

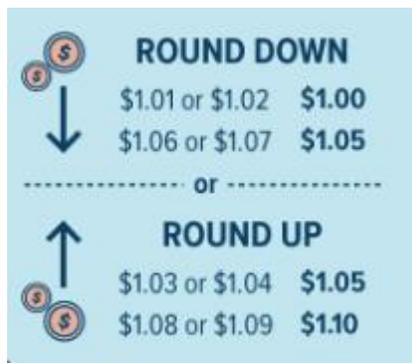


SELF EVALUATION:

How do you think you did? Was there a specific type of question you struggled with? Do you think you need to upgrade or refresh your numeracy skills?

Rounding

In 2013, the Royal Canadian Mint ceased the distribution of the penny. Therefore, total cash payments must be rounded. For example:



ACTIVITY

Practice rounding the total cash payment amounts below.

1. \$3.56 _____
2. \$27.87 _____
3. \$84.39 _____
4. \$2.02 _____
5. \$114.53 _____
6. \$16.66 _____



Making Change

Although technology is usually available to make calculations for us, such as how much change to give a customer, there may be times when the technology fails. When this happens it is important to be able to improvise and complete the transactions without technology.



VIDEO

Watch the video “Making Change”

<https://youtu.be/ZMfpo5OqfzA>



ACTIVITY

Split the class in to 2 groups. One group will be customers and will each be given fake Canadian money. The other group will be customer service representatives (CSR) and will be given a list of cash purchase totals.

- The customers will approach the customer service representative (CSR).
- The CSR will give the customer a cash purchase total from his/her list.
- The customer will give the CSR enough fake money to cover the purchase.
- The CSR will give back the appropriate change.
- When your transaction is complete, the customer will move to another CSR, who will then give the customer the next cash purchase total on his/her list.
- Continue to rotate until all cash purchase totals have been used.
- Then each group will switch roles. The customers will become CSRs and the CSRs will become customers.
- Repeat the process.

Calculating Tax

In Ontario, we have the Harmonized Sales Tax (HST), which is 13%. To calculate tax on an item, simply multiply the price of the item by 1.13. Then round to the nearest cent.

For example:

- The price tag on this shirt is \$9.99
- To calculate the tax, we multiply \$9.99 by 1.13
- $\$9.99 \times 1.13 = 11.2887$
- We then round this number to the nearest cent
- $11.2887 = \$11.29$
- Therefore, the price of this shirt, after taxes is \$11.29



ACTIVITY

Practice calculating tax by completing the questions below.

Before Tax

\$12.97

x 1.13

\$3.49

\$0.88

\$54.99

\$199.99

\$22.66

After Tax

Tax Exemptions

There are some point of sale exemptions and rebates. These include:

1. First Nations
 - Status Indians, Indian bands and councils of Indian bands are eligible for a point of sale exemption from paying the 8% portion of the HST for qualifying off-reserve purchases.
 - Therefore, if calculating tax for a customer with a status card, you will multiply the price of the item by 1.05 to determine the total purchase cost.
 - For a comprehensive guide of Ontario First Nations point of sale exemptions, visit the following link:
<http://www.fin.gov.on.ca/en/guides/hst/80.html>
2. Print newspapers
 - Includes newspapers that contain news, editorials, featured stories or other information of interest to the general public.
 - Must be published at regular intervals (daily, weekly or monthly basis).
 - Does not include flyers, inserts, magazines, periodicals and shoppers.
3. Qualifying prepared food & beverages
 - Must be ready for immediate consumption and are sold for a total price of not more than \$4.00.
4. Books
 - Includes a printed book or an update of a printed book.
 - Includes an audio book.
 - Includes a bound or unbound printed version of a scripture of any religion.
 - Includes a printed book and a read only medium whose content is related and integrated with the book's content and when sold together as a single package.
 - Includes a printed book and a read only medium and/or a right to access a website when sold together as a single package, and if specifically designed for students enrolled in a qualifying course, such as educational courses of elementary or secondary schools.
5. Children's clothing
 - Designed for babies, girls and boys up to and including girls' Canada standard size 16 and boys' Canada standard size 20 including baby bibs, bunting blankets and receiving blankets.
 - Designed for girls and boys in sizes small, medium or large, if the clothing does not have a designated Canada standard size.
 - Children's hosiery or stretchy socks, hats, scarves, gloves and mittens in sizes and styles designated for children.
 - Excludes: costumes, adult sized garments, garments and accessories designed to prevent bodily injury, like sports protective equipment.

6. Children's footwear
 - Designed for babies and girls and boys up to and including girls' size 6 and boys' size 6.
 - Without numerical size that is designated for girls or boys in size small, medium or large.
 - Excludes: skates, rollerblades, ski boots, footwear that has cleats, adult sized footwear, even if acquired for a child.
 - Footwear designed to protect bodily injury.
7. Children's car seats & booster seats
 - Any car seat or booster seat that is a restraint system or booster cushion that confirms with Transport Canada's safety requirements for standards 213, 213.1, 213.2 and 213.5 as described under the Motor Vehicle Safety Act.
 - Excludes travel systems that are a combination stroller carrier and car seat sold in a single package.
8. Diapers
 - Cloth and disposable diapers designed for babies and children.
 - Diaper insert and liners.
 - Rubber pants and training pants.
9. Feminine hygiene products
 - Includes: sanitary napkins, tampons, sanitary belts, other products marked exclusively for purposes similar to the purposes for which the formally mentioned products are marketed.
 - Excludes: deodorants, douches, sprays, syringes, feminine wipes.

It is important for you to know and understand when tax exemptions may apply because:

- You may have to enter the tax amount manually on a point of sale system.
- There may be paperwork that needs to be completed if accepting a status card for tax exemption purposes.
- Customers may ask questions in regards to what taxes have been applied to their purchases.

Document Use

A document is any written or printed paper that displays information. While working in customer service you will use lots of different documents for various tasks.



DISCUSS

What types of documents do you think you may use while working in a customer service job?

When working with documents, you may be required to:

- Read the document
- Fill in information
- Explain to a customer or client how to fill in the document
- Create a document

Reading Documents

Before you begin reading any document ensure you are using the correct document. Ask yourself, what is this document for? Skim the document to make sure it is the document you need to complete your task.

Skim: to read something quickly and incompletely.

Before you begin reading the document, it's a good idea to have a highlighter or pen and paper nearby to highlight or make notes on important or misunderstood details.



As you read the document, if there is information or words you do not understand, highlight the information or make notes so you can ask a supervisor for clarification.



ACTIVITY

Read the document on the following page. As you read, highlight important or misunderstood information. Answer the questions below about the document.

1. What product is the MSDS for?
2. What is the name of the company who supplies the product?
3. What is the hazardous ingredient?
4. What is the product used for?

Sample Material Safety Data Sheet (MSDS)

Section 1: Product Identification *Chlorine*

Manufacturer's Name		Suppliers's Name	
Chemco Manufacturing		Chempro Distributing	
Street Address		Street Address	
1234 Any Street		5678 Another Avenue	
City	Province	City	Province
Edmonton	AB	Edmonton	AB
Postal Code	Emergency Tel:	Postal Code	Emergency Tel:
T5T5T5	(888) 123-4567	T6T6T6	(888) 876-5432
Chemical Name		Chemical Family	Chemical Formula
Chlorine		Halogen	Cl ₂
Product Use			
Pulp bleaching, water treatment, manufacture of plastics, organic and inorganic chlorides, refrigerants, pharmaceuticals.			

Section 2: Hazardous Ingredients *Chlorine*

Hazardous Ingredient	w/w%	CAS Number	PI Number
Chlorine	99.5	7782-50-5	1017
			

Filling in Documents

Some documents will require you to complete them online, while others will be filled in on paper. Regardless of the completion format you should always follow these 4 steps when filling in documents:

1. Read the document and the instructions carefully before beginning. If you don't understand the document or a portion of it, ask a supervisor for help. If it is a complicated form, make a copy to practice filling in the information before completing a final copy.
2. Fill in the document. Use your best penmanship to avoid misinterpretation.
3. Read over the completed document. Make sure you have filled in all necessary information and that the information is correct.
4. Sign and submit the document.

Document Abbreviations & Formats

Documents will often stipulate the letter case and/or ink colour. For example, the document's instructions may state that you must use upper case letters or block letters when filling it in. The document may also specify that you use black ink if you are filling out a paper copy.

When writing dates on documents, be aware of the date format required. You will see instructions for a date format in the form of letter symbols.

yyyy = year

mm = month

dd = day

Example:

The date, September 1, 2023 may be written:

dd/mm/yyyy = 01/09/2023

mm/dd/yyyy = 09/01/2023

yyyy/mm/dd = 2023/09/01

yyyy/dd/mm = 2023/01/09





ACTIVITY

Read the scenario below and fill in the form as if you are an employee of Tiger Mart.

Scenario: You are an employee of Tiger Mart. Your employee number is 65487. A customer has returned a toaster (model # 4592) because it doesn't work. You have inspected the toaster and determined that the power cord is damaged and one of the coils is missing. The toaster was made by Toasters R'Us. It was purchased on June 2, 2023 and returned on June 4, 2023.

Tiger Mart Damaged and Defective Product Form	
Product Name:	Product #:
Manufacturer:	
Date of purchase:	
Date of return:	
Reason for return (check all boxes that apply, and give specific details)	
<input type="checkbox"/> Damaged Comments:	
<input type="checkbox"/> Missing part(s) Comments:	
<input type="checkbox"/> Defective Part(s) Comments:	

Milestone 49

We have now practiced our numeracy and document skills. Complete milestone 49: Compare survey data and make calculations. Successfully completing this milestone will confirm your ability to apply numeracy skills effectively.

Your task is to read the information on page 3 and answer the questions on pages 4 – 5.

When you have completed the activity, make sure your name and today's date are on all required pages and hand the complete milestone to your facilitator.



SESSION 8

In this session you will develop the following skills for success:

Adaptability	You will practice your ability to adjust your behaviour when serving customers with disabilities.
Communication	You will practice your communication skills when working with customers with disabilities.
Creativity & Innovation	You will practice your ability to develop and apply customer service techniques when assisting customers with disabilities. You will use creativity and innovation to find ways to learn new things.
Digital	You will practice your digital skills while finding learning resources online.
Problem Solving	You will practice your ability to identify, work through and solve problems while serving customers and continuing to learn new skills.
Reading	You will find, read and understand information from various sources.
Writing	You will practice your writing skills while using a variety of methods to share information.

Training and Continuous Learning

Depending on the customer service setting you choose to work in, you may be required to have other specific training. Some examples include:

- Food Safety certificate
- Smart Serve certificate
- WHMIS

Food Safety Certificate

It is recommended that anyone who works within a food premise should take part in a food safety course and become certified. Some jobs that work within a food premise can include:

- Restaurant owners/managers
- Chefs, sous chefs, line cooks, etc.
- Dishwashers
- Serving staff
- Hosting staff
- Counter staff at any fast food restaurant
- Any other kitchen help jobs

There are various methods for completing a food safety certificate. If you would like to complete the training online, there are several online platforms that offer the certification.



ACTIVITY

Follow the links below to research your options. Compare information such as cost, duration and requirements for each website.

1. <https://www.foodsafety.ca/l/food-handler-certificate>
2. <https://www.foodsafetytraining.ca/>
3. <https://ingoodhands.ca/>

Share your findings with the group and discuss the options available in your area.

Smart Serve Certificate

The Smart Serve certification is required for any employee who serves or handles alcohol, as well as managers and security staff in Ontario. Therefore, if you choose to work in any setting that will require you to serve or handle alcohol, you will need to complete the certification program.

You can access the training by registering online at smartserve.ca.

Smart Serve Ontario offers the Smart Serve Responsible Alcohol Beverage Sales and Service Training Program. This program is approved by the Alcohol and Gaming Commission of Ontario (AGCO). It is the only responsible alcohol training program in Ontario. Training and test proctoring is all done online.



ACTIVITY

There is a fee participants must pay in order to complete the training. Visit <https://smartserve.ca/> to confirm the current fee. When you have finished your research, share your findings with the group.

Workplace Hazardous Materials Information System (WHMIS)

WHMIS is Canada's national workplace hazard communication standard.

WHMIS contains:

- Cautionary labelling of containers of WHMIS controlled products
- The provision of material safety data sheets (MSDS)
- Worker education and site-specific training programs

Depending on the work setting you choose, you may be required to complete WHMIS training. This is generally done during orientation and training by your employer. However, in some cases you may be required to complete a WHMIS training program before you are hired. There are various organizations that provide WHMIS training.



ACTIVITY

Using a Google search engine, find 3 possible options for completing WHMIS training and list them below.

Accessibility for Ontarians with Disabilities Act (AODA)

The accessibility for Ontarians with Disabilities Act was enacted in 2005. It was created to improve accessibility standards for Ontarians with disabilities to all public institutions.

Accessibility standards are laws that all public establishments must follow to be more accessible to all individuals.

While working in the customer service sector, you may be required to assist/serve/work with individuals with disabilities.



VIDEO:

Watch the “Region of York AODA Accessible Customer Service Training Video”. Take notes and discuss as a group when the video is complete.

<https://www.youtube.com/watch?v=-4v6u1x36L4>

SESSION 9

In this session you will develop the following skills for success:

Adaptability	You will practice your ability to adjust your behaviour when applying for and interviewing for a customer service job.
Communication	You will share and receive information both verbally and written to enhance your resume and interview skills.
Creativity & Innovation	You will practice your creativity and innovation skills when preparing a customer service resume and practicing for a job interview.
Digital	You will practice your digital skills while preparing a resume, cover letter and references sheet.
Reading	You will find, read and understand information from various sources.
Writing	You will practice your writing skills while writing resumes and cover letters.

Resumes

A resume is a one page summary of your skills, education and experience. It is a good idea to spend a good amount of time creating, editing and proofreading your resume. A resume is your advertisement. A strong resume is the key to finding good jobs.

Some common features a resume should include are:

- a) **Heading:** The heading should include your personal information; your name, address and contact information.
- b) **Objective:** Generally, a one sentence explanation of the type of job you are seeking. If you are applying to multiple jobs, change the objective to match each type of job. If you are not sure about the specific jobs available, write about your areas of interest.
- c) **Education:** In this section, you should list education you have completed or are in the process of completing. Include graduation dates or indicate you are presently enrolled still.
- d) **Work Experience:** In this section, you should include previous employers, job title, location and employment start and finish dates. When using dates, a year will suffice, unless the employment start and finish dates occurred within the same year; in that case, include a month.
- e) **Activities/Volunteer Work:** Employers like to see applicants who are involved in community activities. In this section, you can include any organizations you are a part of or volunteer work you have done or are still currently doing.
- f) **Summary of Skills:** This section is sometimes included to list any special skills you may have that were not captured somewhere else on the resume. For example, how many words you can type per minute, or if you speak more than one language.
- g) **References:** It is common practice to state, "references available upon request" at the bottom of your resume. Make sure to prepare list of at least 3 references to take with you to an interview.

Resume Tips

1. Proofread your resume multiple times. Have other people proofread it. An employer will disregard your resume if a single spelling or punctuation error is found.
2. Limit your resume to one page.
3. Use 1-inch margins around the outside of the page. Use 12-point font and a professional font style such as Arial, Calibri or Times New Roman.
4. Make sure you leave adjust the spacing so your resume is easy to read.
5. Ensure your resume is in chronological order, starting with most recent.
6. Always tell the truth. If you exaggerate or lie, you will be caught in a job interview.



ACTIVITY

Fill the resume builder chart below to start the process of writing a resume.

Heading	
Objective	
Education	
Experience	
Activities/ Volunteer Work	
Summary of Skills	
References	

Cover Letters

A cover letter is a document that accompanies your resume. It introduces you to the employer and outlines your qualifications for the job. A cover letter is not always required by an employer when applying for a job. Be sure to read the job posting carefully so you know what elements are required when applying.

A cover letter generally has 3 paragraphs:

1. Introduction
 - a. Introduce yourself
 - b. Explains the purpose of the letter
 - c. Explains why the employer should hire you

2. Body
 - a. Highlights your skills, education and work experience relevant to the job you are applying for

3. Conclusion
 - a. Thank the employer for considering you
 - b. Express your enthusiasm for meeting with the employer in person
 - c. Include your contact information

An example of a cover letter for a customer service position can be found on the following page.

Jane Smith
1 Main Street
Toronto, Ontario
N3T 6C8

Monday, March 6, 2023

Mr. Cocoa's Chocolate Factory
12 First Avenue
London, Ontario
N3T 8B4

Re: Customer Service Representative Position

To Whom It May Concern:

I am writing in response to your listing in the London Gazette for a customer service representative position. Please accept my enclosed resume for consideration.

As a graduate of the Conestoga College Marketing program, I have the formal training necessary for this position. Additionally, with two years of experience in a retail setting, I have excellent customer service skills that can translate well to this position.

I hope to meet with you to discuss how I can be beneficial to your team. I look forward to hearing from you to schedule an interview at your earliest convenience.

Thank you for your consideration.

Sincerely,

Jane Smith
(905)547-0000
Janesmith@gmail.com

Job Interviews

If you are asked to attend a job interview, you have some work to do. First of all, be accommodating to the employer. Do everything you can to attend the appointment you are offered. When you have an interview scheduled, get to work with preparations. The following is a list of job interview tips:

- Prepare thoroughly: Do some research on the company you are applying to. Make sure you understand what they do and what their values and philosophies are.
- Make a good first impression: This might include being punctual, being prepared (bringing references and a copy of your resume with you), dressing professionally and your enthusiasm for the opportunity.
- Run offense, not defense: This means asking open ended questions so you can control the direction of the interview.
- Turn off your cell phone.
- Use positive body language: This might include a smile and avoid crossing your arms.
- Do not bring drinks or food into the interview with you.



VIDEO

Watch the video “Top Interview Tips: Common Questions, Nonverbal Communications and More” for more interview tips for success.

<https://youtu.be/HG68Ymazo18>



ACTIVITY

Answer the practice interview questions below.

1. Why did you choose this particular field?

2. Why are you interested in working for this company?

References

A reference is a person who can confirm that you have the skills and qualifications needed for a specific job. Employers will usually ask you for 3 references. They may call or email your references to ask questions about you and your work history.

A reference can be:

- A manager or supervisor you have worked with
- A teacher or religious leader who knows you well and can verify your skills and qualities
- A customer or client who likes the work you have done
- A volunteer supervisor you have worked with

When you are choosing references there are some things you should and shouldn't do.



REVIEW:

Review the chart below and discuss the dos and don'ts of choosing references.

Dos	Don'ts
Choose references who are work related	Don't include family and friends as references.
Ask people if you can use them as a reference before giving their information to a prospective employer.	Don't put anyone on your list before you speak to them.
Choose at least 3 references	Don't forget to verify their contact information
Confirm your references contact information before giving it to an employer.	Don't write the names of your references on your resume.



ACTIVITY

Use the remainder of class time to work on your resume and/or cover letter.

SESSION 10

In this session you will develop the following skills for success:

Adaptability	You will practice the ability to adjust your behaviour when change occurs and still successfully focus on your responsibilities.
Collaboration	You will learn to work collectively with your classmates while completing a variety of task-based activities to practice your customer service skills.
Communication	You will communicate with classmates and facilitators while practicing your verbal and written communication skills using various techniques.
Creativity & Innovation	You will practice creativity and innovation when using role-play to practice your customer service skills.
Digital	You will use various digital platforms and skills to complete customer service tasks.
Numeracy	You will read and record various numbers while applying your customer service skills.
Problem Solving	You will practice your ability to identify, work through and solve problems while completing a variety of customer service tasks.
Reading	You will find, read and understand information using various techniques learned throughout the series.
Writing	You will document information using various platforms both digitally and hard copy.

In this session you will be given the opportunity to practice all of the customer service skills you have been learning throughout this series. Your facilitator will provide you with a list of tasks to complete.

This session may take place over more than one scheduled class.

When you have completed all tasks assigned by your facilitator, please complete the parting activity on the following page.



Parting Activity

Complete the chart below and discuss your next steps with your facilitator.

Date:	
Program / Learning Series Completed:	Get Set for Customer Service
Milestones Attained:	3: Read an information sheet. 49: Compare survey data and make calculations
Suggested Next Steps:	
Referrals Made:	
Strengths:	
Continue Working On:	
Comments:	



Learner Satisfaction Survey

Please complete the learner satisfaction survey provided by your facilitator.



Thank you for completing the Customer Service Learning Series. Good luck with all future endeavors!

	Level 1	Find & Use Information			Communicate Ideas & Information				Understand & Use Numbers				Use Digital Technology			Manage Learning	Engage With Others
Page	Activity	A1	A2	A3	B1	B2	B3	B4	C1	C2	C3	C4	D1	D2	D3	E	F
6	Discuss information extracted from a video on bad customer service skills.			•	•												•
6	Define and document customer service characteristics.				•	•											
17	Match appropriate responses with scenarios.	•															
21	Brainstorm and document polite responses to customer service interactions.					•											
26	Review and discuss a customer service policy.	•			•												
27	Read warehouse storage guidelines and extract information to answer questions.	•				•											
28	Fill in sample rain check.		•				•										
65	Complete numeracy assessment using a variety of operations.								•	•	•	•					

66	Round dollar amounts to nearest nickle to make change.									•							
72	Read an MSDS sheet and extract information to answer questions.	•															
75	Complete damaged merchandise document.	•															
80	Complete AODA video training.				•												
83	Complete resume builder chart.					•	•										
	Level 2	Find & Use Information			Communicate Ideas & Information				Understand & Use Numbers				Use Digital Technology			Manage Learning	Engage With Others
Page	Activity	A1	A2	A3	B1	B2	B3	B4	C1	C2	C3	C4	D1	D2	D3	E	F
9	Use website to research and document information about chosen occupation.		•			•								•			
12	Use website to research skills required for work.		•			•								•			
31	Write email using email etiquette.					•											
32	Use a schedule to compute time frames.									•							
37	Discuss & analyze sales techniques experienced in everyday life.			•	•												

42	Solve a multi-step common problem as a group.				•												
44	Use internet browser to find and take stress indicator test.	•												•			
47	Work as a group to complete a teamwork challenge.				•												•
55	Use internet browser to research and document information about POS systems.	•				•								•			
67	Complete retail transactions during role-play, including making change and calculating totals.								•								
68	Calculate tax and discounts on retail items.								•								
78	Use internet browser to research continuous learning options.													•			
	Level 3	Find & Use Information			Communicate Ideas & Information				Understand & Use Numbers				Use Digital Technology			Manage Learning	Engage With Others
Page	Activity	A1	A2	A3	B1	B2	B3	B4	C1	C2	C3	C4	D1	D2	D3	E	F
38	Create and present sales pitch to sell group a product or service.				•			•									•
86	Answer practice job interview questions.					•											
88	Write a cover letter					•											

Get Set for Customer Service

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