

Get Set for Customer Service Facilitator Guide

The training has been developed to be delivered over 10-11 sessions. Each session will take 1.5 - 2 hours. Each session has a PowerPoint presentation. There is one learner workbook, which is used for all 10-11 sessions. The workbook can be printed, or distributed online as a fillable PDF. There are individual handouts in some of the sessions and an answer key for the workbook. In addition, there is a sample learner plan template with suggested milestones that can be used by Employment Ontario funded programs.

Employment Ontario Literacy and Basic Skills agencies are required to determine a learning style for each learner. This has been referenced in the learner handbook. However, a learning style survey is not provided in the materials. You can use the learning style survey you are currently using at your agency.

All of the materials that have been created can be personalized for your agency with your own logo. They are either Word documents, or PowerPoint presentation files. Materials from other sources that have been included as examples or resources are PDF's and cannot be personalized.

The cover graphic file has been included in case you want to use it for marketing materials you create.

You will need to print a workbook for each participant learning in person. You will also need to print the assessment and corresponding handouts for the different sessions. You do not need to print the PowerPoint presentations for the participants as the material is included in the Workbook. The learner plan template can be personalized and printed for each participant if you are an Employment Ontario funded agency.

To get started, it is recommended that the facilitator print out a copy of each file that is included. Read through the workbook and corresponding PowerPoint presentations. Review all of the additional handouts and answer keys that have been included. Please note that the materials have been provided in Word, fillable PDF and PowerPoint presentation, which gives you the option to modify them to meet the needs of your agency.

Session 10 can be completed in one or two sessions depending on the resources your facility has for practical training activities. Below is a list of suggested activities to be completed during session 10 and/or 11.

- Have the learners act out a mock restaurant scene. Each learner will play a different part. Some suggested roles can include: host, wait staff, guest, manager. Provide a variety of scenarios for learners to practice.
 - As an additional challenge, have the learner playing the role of host, show a guest to their table who is visually impaired. Their AODA video training from session 8 will help them with this task.

- Provide the learners with a variety of emails from customers. Include some positive and some negative subjects. Have the learners write responses to the emails using proper email etiquette.
- Create a mock retail or grocery establishment. Provide imitation Canadian money to the learners. Have the learners play various staff and customer parts and role play a variety of scenarios provided by the facilitator.
- If a phone is available for learners to use, have them answer phone calls from clients wanting to book appointments. Provide a hard copy or online calendar/schedule for the learners to use to document scheduled appointments. Other learners or staff members can play the role of the client calling to book appointments.
- Have learners complete a variety of forms/documents they may need to use while applying for a customer service job, or working in customer service. Some examples may include:
 - Raincheck
 - Merchandise return form
 - Time sheet
 - Gift certificates
 - Job application
- Have learners take inventory of select products in your facility.

During session 10, or during an optional 11th session, you can have the learners complete a culminating task suitable to their goal path.

Suggested culminating tasks include:

- Employment goal path – administrative assistant
- Employment goal path – customer and information service representative
- Employment goal path – food service
- Employment goal path – delivery driver
- Employment goal path – hospitality event planner

The table on page 3 outlines which documents in the zip file correspond to each step and session.

Step	File name and type for each session
Intake and Assessment	<ul style="list-style-type: none"> • Get Set for Customer Service Assessment (Word) • Learner Plan Template - Get Set for Customer Service (Word) • Get Set for Customer Service Workbook (Word/PDF)
Session 1	<ul style="list-style-type: none"> • Get Set for Customer Service Session 1 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)
Session 2	<ul style="list-style-type: none"> • Get Set for Customer Service Session 2 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)
Session 3	<ul style="list-style-type: none"> • Get Set for Customer Service Session 3 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)
Session 4	<ul style="list-style-type: none"> • Get Set for Customer Service Session 4 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)
Session 5	<ul style="list-style-type: none"> • Get Set for Customer Service Session 5 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF) • Stress reducer ring template – Session 5 (Word)
Session 6	<ul style="list-style-type: none"> • Get Set for Customer Service Session 6 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)
Session 7	<ul style="list-style-type: none"> • Get Set for Customer Service Session 7 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)
Session 8	<ul style="list-style-type: none"> • Get Set for Customer Service Session 8 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)
Session 9	<ul style="list-style-type: none"> • Get Set for Customer Service Session 9 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)
Session 10	<ul style="list-style-type: none"> • Get Set for Customer Service Session 10 (PowerPoint) • Get Set for Customer Service Workbook (Word/PDF)