

Canal and River Trust – Customer Service Induction session

Audience: Volunteer lock keepers

Duration: 60 minutes (additional activities included if more time available)

Resources required: Flipchart or large format paper A3+

Marker pens

A box or bag with an unusual object inside

Printed scenario sheets

Key to note: black text is a suggested script for the facilitator

Blue text is hints and tips on what to expect and suggested answers/ solutions

Green text shows optional activities to be completed if more than 60 minutes is available

Timings	Activities												
5 mins	<p>Show Slide Caring:</p> <p>Let’s start by looking at Caring – as we said earlier 12 million visitors join us every year and we want to make that experience as enjoyable as possible so that they:</p> <ul style="list-style-type: none">• Tell others about their great experience• Return in the future• Become interested in the charity – donating time (as you do) or funds to help us meet our vision into the future <p>Show slide Customer Service priorities:</p> <p>We have 4 customer service priorities and over the next hour we are going to explore what these are and how we can bring them to life with every person we meet on and around the Canal.</p> <p>Optional Activity: Ask the group how they would treat a guest visiting their home. What would they do in preparation? How would they behave with the guest? What sort of things would they say? Explain how people visiting the canals and rivers are our guests and all the things they have talked about are reflected in our service priorities.</p>												
15 mins	<p>Split the group into 3.</p> <p>Let’s get you out of your seats .On the wall I have placed 3 flipcharts showing our 3 service behaviours - Friendly, Helpful and Conscientious. What I’d like you to do in your groups is spend 2 minutes at each flipchart a write up:</p> <ul style="list-style-type: none">• What the word means to you• How you think you can demonstrate this when on the canal <p><i>This should be a quick exercise so keep the groups moving. After each group has visited each flipchart review the output in particular pick up on the how friendly, helpful and conscientious can be demonstrated. Example answers (not exhaustive)</i></p> <table><tr><th><i>Friendly</i></th><th><i>Helpful</i></th><th><i>Conscientious</i></th></tr><tr><td><i>Say Hello/ Hi</i></td><td><i>Share local knowledge</i></td><td><i>Care for property of others</i></td></tr><tr><td><i>Smile</i></td><td><i>Work the locks</i></td><td><i>Be consistent in approach and manner</i></td></tr><tr><td><i>Wave</i></td><td><i>Offer basic first aid</i></td><td></td></tr></table>	<i>Friendly</i>	<i>Helpful</i>	<i>Conscientious</i>	<i>Say Hello/ Hi</i>	<i>Share local knowledge</i>	<i>Care for property of others</i>	<i>Smile</i>	<i>Work the locks</i>	<i>Be consistent in approach and manner</i>	<i>Wave</i>	<i>Offer basic first aid</i>	
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	<p><i>Refer back to the skills people talked about in the introductions – friendly, liking people is very likely to have come out.</i></p>
20 mins	<p><i>Talk through the 4 stages of customer interaction. Ask lots of open questions of the group. This is not about giving people a script. We want natural conversation.</i></p> <p>Let's have a look at the 4 basic stages of a customer conversation.</p> <p>1. Recognising when help is required. How might you know if someone needs some help or advice?</p> <p><i>Common responses: Come up and ask, look a bit lost or confused, wave/ gesture. If people are slow to respond ask How would you attract attention in a busy restaurant or shop?</i></p> <p>There is an assortment of physical and verbal signs that people use when they need help, and to offer great customer service we need to be alert, aware and looking out for these signs.</p> <p><i>Explain about the 4 foot rule;</i> Have you heard of the 4 foot rule? If a person comes within 4 foot of you they naturally expect to be acknowledged. 4 Foot is the length of a handshake – <i>demonstrate this by walking up to someone and putting out your hand when they reciprocate you will be approx 4 foot apart.</i> In mediaeval days 4 foot would be the length of my arm and my sword. 4 foot is considered an acceptable distance for people who don't know each other to communicate.</p> <p><i>It is possible that a conversation may begin about 'pushy people' eg you can't walk into some shops without being pounced on or If people are out for a quiet walk they won't want me talking to them. Let this natural conversation progress – what do people like? What don't they like? What are the signs that we may have over stepped the mark.</i></p> <p>2. Acknowledging customers – once we have recognised that our help is required how do we approach. Ask the group what greetings they naturally use? <i>Hi, hello, good morning, there may be some local saying that are common eg How do?</i></p> <p>Optional activity: Ask the group to move around the room and acknowledge 3 people without talking. Ask the group afterwards what they noticed. What worked? Who was good at non verbal acknowledgement and what was it they did? Who seems to find it easy to connect with customers in this way? Who found it difficult? Ask the group to repeat the activity but this time using verbal and non verbal acknowledgement. Ask the group afterwards what they noticed this time.</p> <p>Once we have greeted the customer we need to understand their need – the best way to do this is by asking questions.</p> <p>To demonstrate this we are going to play a game 'What's in the bag/ box?'</p> <p><i>Pick up the pre prepared bag/ box. Explain the group have 1 question each to try and guess what is in the bag. The only question they can't ask is 'What's in the bag?' Most people will ask questions requiring only a Yes/ No answer, if this is the case, do not elaborate. If they don't guess ask where</i></p>

they think they went wrong? If they do guess ask which questions were most helpful.

Open questions, those requiring more than a Yes/ no answer, gain the most information and also keep a conversation natural and flowing.

Optional Activity: Explain we are all going to practice asking follow up questions to the customer. This means not just saying hello, but also attempting to understand why they are here and how we can help them. An example of this type of question is “what brings you to the canal today?” This is a very neutral question, but helps us understand the reason for the visit. It is also an open question that encourages the customer to talk. Split the group into pairs – one will be the customer, the other themselves (a volunteer lock keeper). **Explain** the individuals playing themselves must acknowledge and greet a customer, and then attempt to find out why the customer is at the canal and what service they can provide them. Once completed ask the group who was especially good at connecting with the customer? Ask specifically what they did that was so good. Ask what the impact of their manner was on you as the customer? **Ask** the group to swap roles. Ask them to repeat the process. Give the group time complete to the exercise. **Ask** them who was especially good at connecting with the customer. Ask specifically what they did that was so good. Ask what the impact of their manner was on you as the customer. **Ask** if anyone has any difficulties or questions.

3. Answering queries – As well as asking questions we will need to provide answers. We can’t all be experts in everything but we may have more knowledge than we think.

Ask the group what they think are the most common queries? See if the group could answer them. If not suggest how they could find out more eg available leaflets, asking others. Share with the group any common queries they have not been raised. This will be picked up again in the local session so do not feel you must provide the answer for questions raised.

4. Closing the conversation. As well as a friendly greeting we need to close a conversation well. Ask the group how they would normally end a conversation with a friend or acquaintance. **Common responses;** See you soon, Take Care, bye for now. If responses are simply Good bye challenge if this is really how they would end a conversation with a friend.

We want and need our customers to keep coming back. We want people to tell others about their great experience on the waterway and come back.

Insert quote re acquaintance on way up flight friend on the way down.

Some of our customers may wish to make a donation as a result of the help and service you have given. Ask the group how they would respond if this

	<p>was the case. <i>Give guidance eg Many thanks I'll pop this in a donations envelope it will really help with funding our XXXXX project.</i></p> <p>Sharing information on the work of the charity – both locally and Nationally- is a great way of getting people interested and involved.</p>
20 mins	<p>So remembering our service behaviours of friendly, helpful and conscientious and adding to this the 4 stages of a customer conversation we will now have a go.</p> <p><i>Split the group into teams of 3.</i></p> <p>Explain that each team will be given a series of scenarios. For each scenario one person will be the individual who needs assistance, one person will be the themselves (a lock keeper volunteer) and the third person will listen in for our 3 service behaviours and the 4 stages</p> <p>Not everyone is confident in 'role play' if this is the case for individuals do not apply pressure. Ask the group to talk through the scenarios and suggest what they would say, how they would approach the situation, get them to think about all the different possible customer reactions and how they would need to alter their style.</p>

Customer service scenarios:

Only give the relevant info to the relevant people

Scenario 1: A busy and wet day

Lock keeper: It is a busy day at your lock and a number of boats are now queuing to get through. The clouds are building and everyone is talking about the rain coming in.

How do you respond to your customers?

Customer: It is a busy day on the canal. Your journey has been very slow. The boat in front is incompetent at getting through locks and you feel you should be allowed to go ahead of them. The clouds are starting to build and there is lots of talk of storms. You would like to be clear of the locks and at your next mooring before the rain starts.

You are becoming increasingly frustrated with the situation and are happy to make this clear to anyone.

Scenario 2: Lost child

Lock keeper: It is a lovely day and the canal is busy with boaters and walkers. You see a person with a buggy running towards you. She is out of breath.

How do you respond to this situation?

Customer: It is a lovely day and you have taken your 2 year old daughter/ granddaughter out for a picnic beside the canal. She was happily picking flowers whilst you laid out the picnic but when you turned round she was gone. You have called her name and looked around the immediate area for a few minutes but are now very worried and need someone to help you.

Scenario 3: Local information

Lock keeper: You are completing some light maintenance on the lock during a quiet day. You have only seen a couple of people all day.

Customer: You have come for a quiet day out walking and bird watching. It is nearly lunchtime and you would like to find somewhere nice to eat where you can buy an inexpensive sandwich or snack and sit outside. You see a lock keeper ahead but they look busy and you don't like to bother people.

Scenario 4: More than one person needing help

Lock keeper: You are talking to a family about the local walkways and cycle paths when a boat approaches your lock.

How can you deal with both customer's needs at once?

Customer: You are approaching a lock and can see the lock keeper talking to a family. You are new to boating and need help, but don't like to admit it. You don't want to have to wait the same length of time as you had to at the last lock as it is starting to get dark.