

Customer care

Activity 4: Analysing customer encounters

Introduction

Learners often find themselves in the role of the customer. When they want to improve their own customer care skills, they can tap into these experiences on several levels. On one level, reflecting on the encounter helps them to develop empathy with customers in general. On another level, analysing customer encounters in a structured way enables learners to draw conclusions about positive and negative behaviours, which they can then apply when dealing with customers themselves.

There are numerous informal opportunities for researching their own experiences as customers. Some of the possibilities are outlined in the learner guidance notes. This activity is very flexible and can fit into a customer care learning programme at many different points. You can also emphasise the research aspects of the activity if this is desirable.

Learning objectives/outcomes

Learners should be able to:

- develop their ability to empathise with customers
- identify negative and positive behaviours that occur during customer encounters
- analyse customer encounters and draw conclusions
- improve their research skills and analytical thinking skills.

Resources required

- Copies of **Sheet 4.1: Learner guidance notes**.
- Copies of **Sheet 4.2: Customer encounter checklist**. The number of copies will depend on how many encounters learners agree to record.
- Customer care storyboards (optional).

Starting points

Activity 2: My best and worst experiences as a customer and **Activity 3: Principles of good customer care** will provide useful preparation for this activity.

Learners could prepare for this activity by conducting their own research into the 'customer care encounters' that they experience over one or two days. For example, they could analyse their experiences when using services such as the bus, hairdresser, medical services or leisure facilities such as clubs or sports centres.

In addition, the storyboards for Customer care would be helpful supporting resources.

Planning learning in multiple environments

This activity can be integrated into individual learning plans in a number of ways, including:

- preparation for work experience
- an activity in the workplace, perhaps with another learner who is on placement at the same company (see the Alternative approaches section)
- preparation for a classroom-based learning session on customer care.

The learning environment can be extended by encouraging learners to conduct research and to evaluate their own 'customer care encounters' or by asking others about their experiences.

Suggested approach

This activity involves experiential learning. The focus on direct experience will engage learners in 'affective' learning, enabling them to develop empathy with anyone who finds themselves in the customer role.

It also engages learners in the collection of facts and observations of customer care skills first hand. They then use their findings to construct theories about their encounters. This helps them to relate theory and practice in a direct and understandable way.

You will find more information about approaches such as experiential learning in Part 3 of **Cross-curricular themes: continuing professional development guide**.

Stage 1: Briefing

Explain the learning objectives. Discuss what the term 'customer care encounters' means. Explain that learners will be researching behaviours that occur during customer care encounters and using their research to draw some conclusions about:

- how customers feel when they experience different kinds of behaviour
- what positive and negative behaviour looks and feels like.

Distribute **Sheet 4.1: Learner guidance notes**. Agree with learners how they will tackle the activity. Set a deadline and ensure learners have enough copies of **Sheet 4.2: Customer encounter checklist**. Give learners time to look at the checklist and ask questions about it. (Note that the checklist may not be applicable in every customer service situation. You may need to adapt it, for example if the 'encounter' is by telephone, website or email).

When you think learners have a sufficient understanding of the task, send them to act as 'customers' either in other parts of your building or out into the community or workplace. Take care not to put learners into dangerous situations and consider whether they need to be supervised while carrying out this task.

Remind them to keep their records anonymous, so that no individual or organisation is identified.

Stage 2: Reflective observation

Learners carry copies of **Sheet 4.2: Customer encounter checklist**. When they experience a customer encounter, they should find a few moments afterwards to tick the boxes on the checklist. They should do this privately.

Stage 3: Analysis

Learners reflect further on their findings and use their analytical skills to answer the questions at the end of the checklist.

Stage 4: Consolidating, checking and reflecting on learning

Learners come together again to share their experiences, findings and conclusions.

You could use 'snowballing' for this. First, ask pairs to share their findings and come to conclusions they agree on. Each pair then joins to form groups of four, who do the same, pooling their views. Join up into groups of eight if you are working with a large group. This approach helps learners form a personal understanding from their own experiences and to reflect on their understanding in the light of discussion and other people's experiences, building wider generalisations.

Take feedback from the groups.

- How do customers feel when they experience positive and negative behaviours?
- What conclusions can be drawn?

You might point out that learners will have seen different behaviours being demonstrated or 'modelled'. Hopefully learners will have encountered staff who are skilled at providing good customer care. Seeing these experts in action and analysing what they do will have provided powerful learning experiences.

At the end of the session, in the whole group, draw attention to the principles of the experiential 'learning by doing' approach and how it can help with problem solving and making sense of experiences.

Ask learners:

- What did they like about the approach? Why?
- What did they find difficult? Why?
- Where could experiential learning be used again?

Alternative approaches

Learners working in co-operative learning teams can use the activity to capture and analyse how well their fellow team members provide internal customer care.

It may be possible for learners to get permission to observe customer encounters where they are not actually the customer. This would need careful setting up by the teacher, but would be particularly worthwhile.

Learners themselves could use 'modelling' to deepen their learning. If they have set personal targets to improve a particular skill, they could ask another learner (or a colleague) to observe them and give them feedback on how they are doing. The checklist can be adapted to become an observation checklist.

Differentiation to meet individual needs

The activity allows learners to engage with the task at their own level. It can be done very simply, or developed further into a research project.

Learners with jobs may have sufficient experience of customer care to make more sophisticated observations than those who are new to the topic.

The activity can be made more challenging by asking learners to conduct their own research and to create their own 'customer encounters checklist'. Learners can bring back their findings and work co-operatively with several other learners to analyse their joint findings and draw conclusions. This encourages high-level skills of analysis, synthesis and evaluation. Statistical analysis of the data could form part of this, providing opportunities for embedding the application of numbers.

Challenges – what learners might do next

Learners could extend the activity by asking family, friends or colleagues to report on their own 'customer care encounters' and add the information to their findings.

You may be able to follow up this activity by observing the learner dealing with internal or external customers during work experience. The aim would be to see to what extent they are able to apply what they have learned when they deal with customers.

If this is not possible, you could use progress reviews and tutorials to talk to the learner about how well they feel they are able to apply what they have learned about customer care.

The activity could be given an equality and diversity perspective if the learners' experience involved being dealt with by someone with a disability. How would the experience shape their judgment about good or poor customer care? Empathy would need to work in two ways and draw out the fact that customers also have a role to play in any transaction.

Embedding literacy, language and numeracy (LLN)

Every learning activity includes many different opportunities to develop LLN skills. Always try to find a naturally-occurring opportunity where learners can immediately appreciate the relevance and importance of the skills they are learning to use.

Your LLN specialist will be able to help you to identify specific levels and curriculum references relevant to this activity and to create engaging learning activities to develop the skills.

The checklist that goes with this activity requires learners to read in detail and get to grips with the language of customer care in order to record their experiences. The questions at the end of the checklist enable them to move from ticking boxes to actively using the vocabulary of customer care. Statistical analysis of the data from everyone's checklists will also allow learners to practise application of number and numeracy skills.

The priority LLN skills that learners will need to complete this activity are speaking and listening. In particular, learners will need to be able use listening skills to make observations.

At Level 1, use strategies to clarify and confirm understanding: for example, facial expressions, body language and verbal prompts.

- Understand listener can use visual and verbal signals to confirm or query understanding with speaker.
(Adult literacy core curriculum reference SLlr/L1.3)

At Level 2, listen for and identify relevant information from extended explanations and presentations on a range of topics.

- Know how to record key relevant points when listening over a more extended period.
(Adult literacy core curriculum reference SLlr/L2.1)

Useful activities might include:

- In pairs, try out some situations in which a learner/customer complains to a learner/customer care person who responds appropriately. The learner/customer reports on whether the learner/customer care person has understood the key points of their complaint. The learner/customer care person reports on whether they could tell if the customer was following what was said or not.

Sheet 4.1: Learner guidance notes

Analysing real customer encounters

This activity is about analysing the customer encounters that happen to you, with yourself in the customer role.

In everyday life you will often be somebody's customer, for instance when you:

- ask the bus driver for information
- buy tickets at the cinema
- ask a colleague at work to provide something that you need
- ask a fellow learner to provide something that you need, for example when working on a team project
- take the car to the garage to be serviced
- go to the bank to open an account
- visit the hospital, doctor's surgery or the dentist.

What is a 'customer encounter'?

When there is an interaction between two people and one person is responsible for providing some kind of service to the other person, this is called a 'customer encounter'.

Did you know there are two basic kinds?

If both people work for the same company, this is called an 'internal customer encounter'. If the customer does not work for the same company, then it is an 'external customer encounter'.

What you need to do

After you experience a customer encounter, take a few moments to look at the **Sheet 4.2: Customer encounter checklist** and tick the relevant boxes.

Do this as soon as you can after the encounter, but do it privately.

Do not make any notes about where the customer encounter happened or who you were dealing with. Keep the sheets anonymous.

Later on, take a little time to reflect on what has happened and answer the questions at the bottom of the checklist.

Sheet 4.2: Customer encounter checklist

First impressions

- Did they make eye contact with you? Yes No
- Did they greet you in some way? Yes No
 For example, a nod, a 'hello', a 'may I help?'

Finding out about you and your needs

- Did they ask the right questions to find out exactly what you needed? Yes Partly No
- Did they listen carefully to you? Yes Partly No

Meeting your needs

- Did they know their job? Yes Partly No
- Did they meet your needs? Yes Partly No
- Did they do more than you'd expected (exceed your expectations)? Yes Partly No

Did you notice any of the following behaviours during the encounter?

Positive behaviours		Negative behaviours	
Smiling	<input type="checkbox"/>	Not enough eye contact	<input type="checkbox"/>
Looking calm	<input type="checkbox"/>	Looking tense or angry	<input type="checkbox"/>
Nodding when listening	<input type="checkbox"/>	Not appearing to listen	<input type="checkbox"/>
Polite at all times	<input type="checkbox"/>	Rude, impatient or abrupt	<input type="checkbox"/>
Looking confident	<input type="checkbox"/>	Looking unsure or confused	<input type="checkbox"/>

General questions

How did you feel at the end of the encounter?

Why did you feel like that?

Would you be happy to deal with the person again, or would you try to avoid them in future?

Session plan

Aim: To help learners empathise with customers and recognise the importance of positive customer care behaviours.

Learning objectives/outcomes

Learners should be able to:

- develop their ability to empathise with customers
- identify negative and positive behaviours that occur during customer encounters
- analyse customer encounters and draw conclusions
- improve their research skills and analytical thinking skills.

Time	Teacher plan	Learner activity	Resources
0-15 min	Stage 1 Explain the learning objectives. Introduce activity. Distribute Sheet 1 and 2.		Sheet 4.1. Sheet 4.2.
Over a week or agreed time.	Stage 2	Record and reflect on customer encounters using Sheet 4.2.	
In learners' own time or up to 30 minutes in class	Stage 3	Reflect further and analyse findings using the questions at the end of Sheet 4.2.	
30-50 min	Stage 4 Bring learners together to discuss their findings, using a 'snowball' approach (optional). Encourage learners to reflect on the experiential learning approach.	Share experiences, findings and conclusions. This could be done using a 'snowball' approach. Reflect on the learning process.	

Assessment of learning objectives/outcomes

- Monitoring of pair discussions and feedback.
- Learners reflect on what they have learnt and how they learnt.

Differentiation to meet individual needs

- The questions in **Sheet 4.2: Customer encounter checklist** can be simplified or extended to meet individual learning needs.
- The activity could also be extended further into a research project.

Teacher evaluation

Consider which parts of the session were effective and why.

Learner feedback

Consider whether the activities were suitable for all learners and whether the session helped to develop the expert learners.

Personal, learning and thinking skills developed

- Independent enquirers:
 - Identify questions to answer.
 - Analyse and evaluate information, judging its relevance and value.
 - Support conclusions, using reasoned arguments and evidence.
- Reflective learners:
 - Evaluate experiences and learning.
 - Communicate their learning in relevant ways.

Literacy, language and numeracy skills developed

Language

At Level 1 and 2, use listening skills to listen for and identify relevant information.