

Customer care

Activity 2: Exploring customer care skills, knowledge and attitudes

Introduction

Customer care is an important topic in all subject or vocational areas.

In order to improve their employability skills and provide good customer care, learners will need to acquire a range of skills relevant to their subject or vocational area. This activity will help learners to understand the difference between skills, knowledge and attitudes and provides the opportunity to explore these in relation to providing good customer care, particularly in face-to-face situations. The concept, however, can be adapted to any situation where learning is taking place in the affective domain (refer to Part 3 of the **Cross-curricular themes: continuing professional development guide** for more detailed information about learning in the affective domain.)

In this activity you will ask learners to consider a selection of attributes and to identify firstly which of these are important to customer care; and secondly, whether each attribute is a skill, knowledge or an attitude.

This activity promotes high-level thinking skills and assessment for learning, as learners discuss and share their understanding of the topic. This process of discussion and checking provides opportunities for peer explanation, which is an effective way for learners to develop their understanding of the skills, knowledge and attitudes required in customer care. Most importantly, this activity allows learners to check progress at each stage and this informs subsequent learning.

Learning objectives/outcomes

Learners should be able to:

- identify the essential and desirable attributes needed to provide good customer care
- identify the skills, knowledge and attitudes needed to provide good customer care.

Resources required

- A copy of **Customer care: the learning points** document (included in the continuing professional development section of the cross-curricular resources).
- Sets of **Sheet 2.1: Customer care attributes cards**. These can be cut up into individual cards.
- Four or five copies of Sheet 2.2: Customer care board – template 1.
- Four or five copies of Sheet 2.3: Customer care board – template 2.
- Copies of Sheet 2.4: Customer care attributes checklist.
- Copies of Sheet 2.5: Customer care skills, knowledge and attitudes checklist.

Starting points

Learners do not require any detailed prior learning about customer care to undertake this activity. However, the activity expands on the ideas introduced in **Activity 5: Create a job advertisement**. Learners can also prepare for the session in the ways suggested below.

Planning learning in multiple environments

Learners could prepare for this activity by investigating what customer care means in their subject or vocational area. They could do this by seeking information from their colleagues and employer. They could ask their employer which specific skills they consider to be important in their workplace.

Alternatively, learners could consider their experience of customer care in their own lives. Learners could explore which customer care skills they value when they are a customer buying products or services, for example what skills do they expect of someone who works in a mobile phone shop?

Suggested approach

These two card activities require learners to think through issues, relate them to their experiences and share ideas and knowledge in order to decide how to group the factors. Learners enjoy activities like this as they are great fun and encourage real attention to the task. They also allow misunderstandings to be checked and corrected and provide the teacher with feedback on levels of understanding.

These are simple but high order tasks that promote deep learning at all levels and challenge learners to check and extend their understanding. Tasks that require analysis, synthesis and evaluation are not necessarily difficult. However, they require different mental processes than lower order tasks such as knowledge, comprehension and application, which require only recall and minimal understanding. High order tasks, such as grouping and classification, require learners to make judgements and decisions based on real understanding.

Stage 1

Introduce the session by outlining the learning objectives and, if appropriate, refer to previous customer care sessions. Alternatively, you can use the **Customer care: the learning points** sheet to help you generate an introductory discussion.

Engage learners in a discussion about what attributes are important customer care. At this stage you are looking for broad rather than specific responses. Write the responses on a flip chart and put this to one side for comparison at the end of the session.

Stage 2

Ask learners to organise themselves into groups of four or five and explain that they will be using a card sorting activity to promote group discussion, which will help them to learn about the skills, knowledge and attitudes required to provide good customer care.

Increase the relevance of this activity by providing learners with a subject or vocational context that is applicable to them, rather than a general concept. The card sort task requires learners to prioritise and make judgements, and by grounding the task in a clear subject or vocational context you can assist them to make decisions against a familiar backdrop.

Give each group a set of cards prepared from **Sheet 2.1: Customer care attributes cards** and a copy of **Sheet 2.2: Customer care board – template 1**. Ask learners to lay the cards face down on the table or, alternatively, one member of the group can 'deal' the cards out to all members.

Explain that the cards contain descriptions of attributes relating to customer care, which may be essential, desirable or undesirable. Explain that there are also some cards that are 'red herrings', which are not important to customer care and should be rejected. Spurious cards are important to generate uncertainty and to promote deep thought.

Ask learners to take turns reading out the attribute on the card, to discuss what they understand by it and, as a group, to decide whether the attribute is essential, desirable or undesirable in customer care – and why. When the group has agreed where the attribute belongs, they place the card on the relevant section on the board to form piles.

There are also 10 blank cards on which the group can write other attributes.

Stage 3

Allow the groups to work independently, and provide support where necessary to:

- move discussion forward
- explain any new terms
- monitor individual contributions and encourage participation by all group members.

Stage 4

Once the groups have completed this stage of the activity, ask them to put the desirable, undesirable and rejected cards to one side for now and concentrate on the ones they have defined as 'essential'.

Engage the whole group in a discussion by inviting each group to contribute five attributes that they think are essential. Check for agreement from the other groups and discuss those on which groups disagree. Encourage learners to ask questions of each other in order to decide on a whole group response.

Groups can add or remove attributes from the other categories if they can justify their decisions. You should aim to have 22 attributes on which everyone agrees. You will also need to consider any blank cards that have been completed by the learners. You can compare the results with those suggested on **Sheet 2.4: Customer care attributes checklist**. The checklist provides some suggestions, but is designed to be used flexibly, as some groups may offer different but valid responses depending on the subject or vocational area. You can use the checklist to aid the discussion process and draw out learners' opinions.

The process of discussion and checking provides a powerful way to embed assessment for learning in the session through peer review. It helps learners to check progress at this stage of the activity, which informs learning in the next stage.

Stage 5

Next ask learners to refine their understanding by exploring whether the 'essential' attributes represent skills, knowledge or attitudes. Learners may find it difficult to understand the difference between these concepts. Ask them to brainstorm some examples of each from their own experiences and record them on a flip chart under the three headings. Use discussion to tease out the differences. You should try to come to agreement on definitions such as the following:

Skill: the ability to do something

Knowledge: information and skill acquired

Attitude: a way of thinking or feeling

Distribute copies of **Sheet 2.3: Customer care board - template 2** and ask learners to work again in their small groups to classify the 'essential' attributes further. This time they are to separate the cards into skills, knowledge and attitudes.

It is important for learners to be able to distinguish between skills, knowledge and attitudes and understand the difference between the three. This is useful in terms of planning future learning and, if the extension activity below is used, it will help learners to self-assess and set personal targets for further development.

As in the previous stage, emphasise that the process of discussion is important in order to provide an answer on which they all agree. As agreement is reached, learners place the card on the relevant section on the board to form piles.

Stage 6

In order to check that the attributes have been accurately identified as skills, knowledge or attitudes, invite groups to share their answers. This time ask one group to contribute 'skills', another group to contribute 'knowledge' and a third 'attitudes'. If you have more than three groups, make sure that each has the opportunity to contribute. As with Stage 2, check for agreement from the other groups and discuss those on which groups disagree.

Compare the results with the suggested profile of essential attributes in **Sheet 2.5: Customer care skills, knowledge and attitudes checklist**. This checklist is designed to be used flexibly as some groups may offer different but valid responses, dependent on the subject or vocational area.

Repeat the steps in Stage 5 and Stage 6 with the cards in the desirable pile. Alternatively, if time is short, you could miss out Stage 6 for this category and issue learners with a copy of **Sheet 2.5**.

Stage 7

To complete the review of attributes, ask learners to revisit the cards in the **undesirable** pile and to discuss the effect that an individual with this combination of qualities would have on customers.

Stage 8: Consolidation, checking and reflecting on learning

Ask learners to write up their agreed collective response on a flip chart. They could create three flip charts showing the essential skills, knowledge and attitudes and a fourth listing the effects of undesirable customer care.

Ask learners to compare their new lists with the flip chart of general attributes from the start of the session. These sheets could be kept and used as a reference for future customer care sessions.

To close the session, ask learners to reflect and comment on:

- what they have learned about skills, knowledge and attitudes in relation to customer care
- what they know now, that they did not know at the beginning of the session
- how their learning has developed during the course of the session
- what has helped them to learn
- what personal, learning and thinking skills they have used
- which language and literacy skills have been used in this session.

Ask learners where they will use this knowledge and particularly how they could apply it to their workplace. Suggestions might include:

- identifying where they use the skills in their workplace
- listing the knowledge they have about the products or services supplied by their employers
- looking out for examples of good customer care attitudes, either in their workplace or in everyday situations
- identifying which skills, knowledge and attitudes they already possess and which they would benefit from developing. (See the section below: Challenges – what learners might do next, and set personal targets.)

Alternative approaches

This activity can be carried out with individual learners and, if using the extension described below, as part of the process of developing individual learning plans.

Differentiation to meet individual needs

Some of the terminology on the cards may be unfamiliar to some learners so you may need to alter the wording. Alternatively, pair up more confident and less confident learners in groups.

You may want to reduce the number of stages included in a single session and deliver this over two sessions.

Some learners may find the volume of cards overwhelming so you may need to reduce the number of cards by carefully selecting a mix of cards. Alternatively, use only one set of cards split between several groups and facilitate the activity as a whole group task.

Challenges – what learners might do next

This activity can be extended for individual learners by asking them to assess which of the essential or desirable skills they possess – with evidence to support this. Using only the essential skills cards, create header cards stating: 'I have this skill'; 'I need to develop this skill' and 'Not sure.' Learners then sort the cards under each of the headings. This helps them to self-assess against the skills that are deemed as essential in customer care. They can then set personal targets for further development.

This extension activity could be used for learners to self-assess against the knowledge and attitudes deemed as essential in customer care and to set targets against all three attributes. Alternatively you may wish to focus on an area applicable to the individual learner and their specific job role.

Another option for more confident learners is to ask them to compare two different job contexts and discuss the relative importance of the skills, knowledge and attitudes identified in the card sorting activity.

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 may 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. You will be able to identify the general type of LLN skills required as you probably use the skills yourself everyday.

The activity can be used to help learners develop the speaking and listening skills below.

At Level 1, respect the turn-taking rights of others during discussions.

- Understand that an effective discussion involves everyone having a fair chance to make their contributions.
- Know and use some strategies to signal to others that they can speak (facial expression, gesture, phrases).
(Adult literacy core curriculum reference SLd/L1.2)

At Level 2, support opinions and arguments with evidence.

- Understand that productive discussion involves making valid and convincing points, not browbeating people to accept own view.
- Know how to research information for a discussion.
- Use factual information and knowledge to support views and arguments.
(Adult literacy core curriculum reference SLd/L2.4)

Useful activities might include:

- Share with learners some 'turn-taking' tips for use in their own discussions. Examples could include:
 - sitting in a circle
 - encouraging less confident speakers
 - keeping tabs on your own contributions – don't opt out but don't dominate
 - use your contribution to draw in someone else.
- Ask learners to identify the difference between convincing people and wearing them down. Ask them for examples of where they have been worn down in a discussion and what the implications were – were they truly convinced? Relate this to the learning situation. If they are just told that is the case without supporting facts, does the learning really take place?

Sheet 2.1: Customer care attributes cards

Honest and trustworthy

1

Careful listener

2

Deals with complaints well

3

Good knowledge of products or service being sold

4

Communicates well with others

5

Understands who the customers are

6

Highly motivated

7

Good at dealing with numbers

8

Has worked in other areas of the organisation

9

Is ambitious and competitive

10

Enjoys telling jokes

11

Reads the financial newspapers

12

Dishonest

13

Works well in a team

14

Aggressive

15

Lazy

16

Always makes the customer see his or her point of view

17

Talks more than listens

18

Friendly

19

Checks that the customer understands

20

Is good at explaining things

21

Knows the difference between good, acceptable and poor levels of service

22

Is aware of what other parts of the organisation do

23

Gets on well with colleagues

24

Wants to understand customers' needs

25

Knows when to back down

26

Is good at solving problems

27

Knows the strengths and weaknesses of a product or service

28

Always meets deadlines

29

Makes friends easily

30

**Treats colleagues in the same way
as customers**

31

Has good exam results

32

Enthusiastic

33

Smart and well-presented

34

Has worked for the company for 20 years

35

Quiet and shy

36

Rarely loses an argument

37

Reliable

38

Punctual

39

Manages tasks and time effectively

40

Forceful

41

Uses initiative

42

Has a good sense of humour

43

Is a good leader

44

Loses his or her temper easily

45

Promises anything to keep the customer happy

46

Critical of colleagues

47

Impatient

48

Patient

49

Does not make assumptions

50

Courteous and polite

51

Has a business qualification

52

Never loses temper with a customer

53

Does not understand why customers get upset

54

Able to set priorities

55

Not at his or her best after a party the night before!

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Sheet 2.2: Customer care board – template 1

Essential

Desirable

Undesirable

Sheet 2.3: Customer care board – template 2

Skills

Knowledge

Attitudes

Sheet 2.4: Customer care attributes checklist

The following table provides a suggested categorisation of essential, desirable and undesirable attributes in customer care. Different categorisation may also be valid depending on the subject or vocational area.

Card number	Attributes	Essential	Desirable	Undesirable	Red herrings
1	Honest and trustworthy	Y			
2	Careful listener	Y			
3	Deals with complaints well	Y			
4	Good knowledge of products or service being sold	Y			
5	Communicates well with others	Y			
6	Understands who the customers are	Y			
7	Highly motivated		Y		
8	Good at dealing with numbers		Y		
9	Has worked in other areas of the organisation		Y		
10	Is ambitious and competitive				Y
11	Enjoys telling jokes				Y
12	Reads the financial newspapers				Y
13	Dishonest			Y	
14	Works well in a team		Y		
15	Aggressive			Y	
16	Lazy			Y	
17	Always makes the customer see his or her point of view			Y	
18	Talks more than listens			Y	

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19	Friendly	Y		
20	Checks that the customer understands	Y		
21	Is good at explaining things	Y		
22	Knows the difference between good, acceptable and poor levels of service	Y		
23	Is aware of what other parts of the organisation do		Y	
24	Gets on well with colleagues		Y	
25	Wants to understand customers' needs	Y		
26	Knows when to back down	Y		
27	Is good at solving problems	Y		
28	Knows the strengths and weaknesses of a product or service		Y	
29	Always meets deadlines		Y	
30	Makes friends easily			Y
31	Treats colleagues in the same way as customers	Y		
32	Has good exam results			Y
33	Enthusiastic	Y		
34	Smart and well-presented		Y	
35	Has worked for the company for 20 years			Y
36	Quiet and shy			Y
37	Rarely loses an argument			Y
38	Reliable	Y		

Customer Care

39	Punctual	Y		
40	Manages tasks and time effectively		Y	
41	Forceful			Y
42	Uses initiative	Y		
43	Has a good sense of humour			Y
44	Is a good leader			Y
45	Loses his or her temper easily			Y
46	Promises anything to keep the customer happy			Y
47	Critical of colleagues			Y
48	Impatient			Y
49	Patient	Y		
50	Does not make assumptions	Y		
51	Courteous and polite	Y		
52	Has a business qualification			Y
53	Never loses temper with a customer	Y		
54	Does not understand why customers get upset			Y
55	Able to set priorities		Y	
56	Not at his or her best after a party the night before!			Y

Sheet 2.5: Customer care skills, knowledge and attitudes checklist

Essential skills

- 2 Careful listener
- 3 Deals with complaints well
- 5 Communicates well with others
- 21 Is good at explaining things
- 27 Is good at solving problems

Essential knowledge

- 4 Good knowledge of products or service being sold
- 6 Understands who the customers are
- 22 Knows the difference between good, acceptable and poor levels of service

Essential attitudes

- 1 Honest and trustworthy
- 19 Friendly
- 20 Checks that the customer understands
- 25 Wants to understand customers' needs
- 26 Knows when to back down
- 31 Treats colleagues in the same way as customers
- 33 Enthusiastic
- 38 Reliable
- 39 Punctual
- 42 Uses initiative
- 49 Patient
- 50 Does not make assumptions
- 51 Courteous and polite
- 53 Never loses temper with a customer

Desirable skills

- 8 Good at dealing with numbers
- 40 Manages tasks and time effectively
- 55 Able to set priorities

Desirable knowledge

- 9 Has worked in other areas of the organisation
- 23 Is aware of what other parts of the organisation do
- 28 Knows the strengths and weaknesses of a product or service

Desirable attitudes

- 7 Highly motivated
- 14 Works well in a team
- 24 Gets on well with colleagues
- 29 Always meets deadlines
- 34 Smart and well-presented

Session plan

Aim: To help learners recognise the difference between skills, knowledge and attitudes in relation to providing good customer care.

Learning objectives/outcomes			
Learners should be able to:			
<ul style="list-style-type: none"> • identify the essential and desirable attributes needed to provide good customer care • identify the skills, knowledge and attitudes needed to provide good customer care. 			
Time	Teacher plan	Learner activity	Resources
0-5 min	Stage 1 Set the scene and test learners' understanding of customer care.	Group discussion. Personal contribution.	Flip chart. Customer care: the learning points document.
5-10 min	Stages 2 Introduce exercise and form small groups. Brief groups.		Set of cards (produced from Sheet 2.1) Sheet 2.2.
10-25 min	Stage 3 Support groups as they complete card-sort task.	Contribute to group discussion.	
25-40 min	Stage 4 Groups share their answers and gain feedback from other groups.	Share outcomes from small group discussion.	Sheet 2.4.
40-55 min	Stage 5 Support groups as they complete next stage of the task.	Contribute to discussion.	Sheet 2.3.
55-75 min	Stage 6 Groups share their answers and gain feedback from other groups. Repeat Stages 5 and 6 for desirable category.	Share outcomes from small group discussion.	Sheet 2.5.

75-80 min	Stage 7 Facilitate whole group feedback and summarise possible actions.	Group discussions.	
80-95 min	Stage 8 Consolidating, checking and reflecting.	Group discussion (and/or create a flip chart or poster to explain understanding.)	Flip charts and pens.

Assessment of learning objectives/outcomes

- Feedback from each group using flip chart or poster.

Differentiation to meet individual needs

- Ensure terminology on cards is familiar to learner. If not, provide explanations or alternative words.
- Check volume of cards is suitable for the group. If not, either reduce the number of cards by carefully selecting a mix of cards or use only one set of cards, split between several groups and facilitate the activity as a whole group task.

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.
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Personal, learning and thinking skills developed

- Team workers:
 - Reach agreements, managing discussion to achieve results.
- Creative thinkers:
 - Ask questions to extend their thinking.
 - Question their own and others' assumptions.

Literacy, language and numeracy skills developed

Language

At Level 1, respect the turn-taking rights of others during discussions.
At Level 2, support opinions and arguments with evidence.