



Customer Service for Assisted Living

PROVIDING EXCEPTIONAL CARE AND SERVICE TO ASSISTED LIVING RESIDENTS



NATION'S
LARGEST
PROVIDER
OF ASSISTED
LIVING
TRAINING

- NURSING
- SALES & MARKETING
- CAREGIVING
- MANAGEMENT

Customer Service in Assisted Living

A Leader's Guide to Energizing
Your Customer Service Team



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Acknowledgments

Sincere thanks to the following people who contributed to this training manual:

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About These Customer Service Training Modules

These **Customer Service Training Modules** consist of easy-to-use lesson plans with:

- Instructor's notes.
- Handouts (an electronic copy—in Adobe PDF format is on the accompanying CD-ROM).
- Self-Check Questions (an electronic copy—in Adobe PDF format—is on the accompanying CD-ROM).
- Certificate of Merit—for training participants (an electronic copy—in Adobe PDF format—is on the accompanying CD-ROM).

These brief in-services will give Participants an opportunity to discuss customer service and practice various skills that will make lasting positive impressions.

Preparing to Present the In-Services

First, you must read and be familiar with the **Customer Service in Assisted Living Manual**.

Everything you need to present the in-services is included with these Training Modules. Allow enough time prior to each in-service to:

- Review the instructor's note.
- Prepare additional notes of your own.
- Make the appropriate number of copies of the handouts.
- Be familiar with the roleplay / activity instructions.

How to Use the Instructor's Notes

The Instructor's Notes offer a **guide** to delivering the training modules. The notes do not offer a complete script. The reason for this is that you are training adult learners who have experience and opinions. Your role is to **facilitate** discussion, not lecture.

Throughout the notes, specific activities and directions are provided to help you present the information clearly and easily. You will also find handouts that will help you present important information.






Text that is written in ***bold and italics*** indicates **sample scripting**; however, you may customize the material to be more reflective of your own word choices. Again, complete scripting is not provided. Therefore, **you will need to spend some time planning**.






Throughout the Instructor's Notes, several graphics are used to help you see at a glance what you are supposed to do. The tables on the following two pages show each graphic and how it is used.



The modules are designed for 15- to 20-minute time periods. These timeframes offer flexibility. For example:

- If you have 15 minutes available during a monthly staff meeting, you can conduct one module.
- If you have 30 minutes available for a regularly scheduled staff in-service you can conduct two modules.

This Picture...	Indicates...
	<p>...the time required to complete the module.</p>
	<p>... the introduction to the module.</p>
	<p>...where you will present or review important information.</p>
	<p>...a question for you to ask the Participants.</p>
	<p>... a roleplay or exercise you will facilitate to provide practical experience for Participants.</p>

This Picture...	Indicates...
	... a handout for the Participants.
	... a key point for you to emphasize with the Participants.
	... a note for the facilitator.
	... where to use a flipchart .
	... the conclusion of the module.

Module

1: What Is Customer Service?

What You Will Need

Instructor's Notes

Handouts

Self-Check Questions



INTRODUCE this in-service by saying:

Over the next several weeks, we will be conducting in-services geared toward improving our level of customer service. Today's in-service is an overview of customer service.



DISTRIBUTE the training objectives for this module.

REVIEW the training objectives.

By the end of this module, Participants will be able to:

- Define the term customer service.
- List examples of customers.
- Explain the term moments of truth.
- Explain why service excellence is good for our community.
- Explain the Golden Rule of Customer Service.

REVIEW the definition of customer service that appears on the framing objectives handout.



ASK the Participants the following question:

As the definition states, "customer service" is defined as the actions we take to create a good experience for the customer.

As a customer, what are some recent good service experiences that you have had?



KEY POINT:

EXPLAIN the Golden Rule of Customer Service: “Treat others as you would like to be treated.”



ASK the Participants:

*Before we go on, let’s create a list of our customers.
Who do you consider to be a customer?*






As the Participants to name the various customer groups. **RECORD** their answers on the **FLIP CHART**.

Make sure that all of the following customer groups get recorded:

- Residents
- Families
- Prospects
- Our co-workers
- Referral sources
- Vendors
- Volunteers
- Anyone who comes into our community

EXPLAIN to the Participants:

Everyday we interact with customers in our community. They have experiences with us just like you have had with sellers and service providers. They too, feel either very happy or very unhappy with their experience. Our goal always is to create a satisfied customer.

	<p>ASK the following question:</p> <p><i>In what ways is good customer service good for our community?</i></p> <p>Example responses include:</p> <ul style="list-style-type: none"> • More people will want to come to our community. • The residents will be happy. • Our job will be easier because people are happy. • Our customers will tell other people about us.
	<p>Make the following KEY POINTS:</p> <ul style="list-style-type: none"> • Good customer service enhances our reputation. • Good customer service means fewer complaints which makes our job easier.
	<p>CONCLUDE this in-service by saying:</p> <p><i>Customer service isn't something extra we do at work. It is the way we do our work. Good service enhances our reputation and makes our jobs easier. Over the next several weeks, we will continue to have customer service training.</i></p> <p><i>Before we meet again, be thinking about what you can do to make a customer's moment of truth a good one. We will talk more about moments of truth at upcoming in-services. Remember, our goal is to provide the best service we can.</i></p>

Module

1: Handouts

In-Service Objectives

What Is Customer Service?

Self-Check Questions

Module 1: What Is Customer Service? In-Service Objectives

When you have completed this in-service, you will be able to:

- Define the term customer service.
- List examples of customers.
- Explain the term moments of truth.
- Explain why service excellence is good for our community.
- Explain the Golden Rule of Customer Service.

Module I: What Is Customer Service?

Self-Check Questions

1. A customer will feel that our service is good when:
 - a. Our census is low.
 - b. We lower our rates.
 - c. He or she feels satisfied about their experience with us.
 - d. All of the above.
 - e. None of the above.

2. The following people are customers:
 - a. Residents and their families.
 - b. Vendors and referral sources
 - c. Co-workers and anyone else who comes into our community
 - d. All of the above
 - e. None of the above

3. A “moment of truth” is when:
 - a. We tell the customer what’s on our mind.
 - b. We confront a co-worker.
 - c. We have an interaction with a customer during which he/she makes a judgment about our service.
 - d. Both “A” and “B”

4. Which of the following are examples of moments of truth:
 - a. The way that I answer the phone.
 - b. The way I greet someone in our community.
 - c. How quickly I respond to a resident when he/she needs something.
 - d. All of the above
 - e. None of the above