67. Marketing, Sales, and Service Cluster - Customer Service Careers (4 hours)

Purpose/Abstract: To introduce students to customer service careers.
NCCCS Adult Education Standards: R.4.2.1, S.1.2.6 , M.3.2.4

Learning Objective:
By the end of the session, students will be able to:
- Explain the importance of customer service in businesses and organizations.
- Describe how each soft skill contributes to providing exceptional customer service experiences.
- using real-life examples of situations where each soft skill is crucial in customer interactions.
- Demonstrate effective use of soft skills, including communication, problem-solving, teamwork, and professionalism, within the context of role play scenarios.

Soft Skills	communication, enthusiasm & attitude, teamwork, networking, problem solving & critical thinking, professionalism	**Resources**	[Customer Service Representatives Career Video](#) Handouts: Math Practice - one for each student

Additional Materials
- Math Practice handout - one for each student
- Art supplies (glue, glitter, markers, paint, etc.)
- Pencils, paper, and scissors
- Computers for student use

Icons	🗨 **Activity**	✔ **Check-In**	↺ **Review**

PREPARATION
- Watch [Customer Service Representatives Career Video](#) and jot down key points to discuss with students.
- Review the [Instructional Support Guide](#) and print/prepare referenced scaffolds.
- Print handouts.
- Familiarize yourself with [O*NET](#)
- Familiarize yourself with [Skills to Pay the Bills,](#) though it won't be used directly in this lesson.

INTRODUCTION (30 min)

Welcome students to the class!

Guide a class discussion about personal experiences as customers and their impact on impressions of companies. Pose these questions to help students reflect:
- *"What is customer service?"*

- *"Why is it essential for businesses and organizations?"*
- *"How does it affect customer loyalty?"*

Play [Customer Service Representatives Career Video](#) and summarize the key ideas from the video. Clarify questions students may have.

Share the objectives of the lesson.

VOCABULARY, READING & WRITING (45 min)

Project the following passage and have students take turns reading it aloud. This will help students practice their reading fluency in a group. Consider reading the passage twice so more students get a chance to read alout. Have students guess what the words and phrases and bold print mean using context clues.

Customer Service Representatives (CSRs) play a pivotal role in various industries, offering **essential** support and information to customers. These individuals, who are often found in positions such as Account Representative, Customer Service Specialist, and Member Services Representative, **are the backbone** of ensuring customer satisfaction. Their responsibilities **encompass** a wide range of tasks aimed at delivering quality service.

On a day-to-day basis, CSRs interact with customers through telephone or in-person communication, where they provide basic or scripted information regarding products and services. This interaction extends beyond just providing information; they also facilitate transactions, take orders, cancel accounts, and handle complaints. CSRs are the go-to professionals for customers seeking assistance with their **inquiries** or issues.

To excel in this role, CSRs must possess a diverse set of skills and knowledge. Their knowledge base encompasses aspects of business, customer service, and management. They must be **proficient** in the English language and possess a grasp of math and science, including arithmetic, algebra, geometry, calculus, or statistics. Additionally, they often work with technology, requiring proficiency in computers and electronics.

The skills and abilities required for success as a CSR are equally diverse. CSRs must be **adept** at active listening, ensuring that they understand customer concerns fully. Problem-solving is a critical skill, as they must identify issues and work towards the best possible solutions. Their social skills shine as they look for ways to assist people and **facilitate** conflict resolution, bringing individuals together to find common ground.

A CSR's personality traits are **crucial** in determining their success in this role. Those who thrive in this career typically enjoy activities involving leadership, decision-making, and business operations. Dependability, attention to detail, self-control, stress tolerance, integrity, and adaptability are qualities that enable CSRs to excel in their jobs, providing exceptional customer service and resolving issues effectively.

💬 REFLECTION (15 minutes)

✔ Ask the following questions and guide a short discussion around soft skills that are important for CSR roles such as communication, enthusiasm & attitude, teamwork, networking, problem solving & critical thinking, professionalism.

- *What are some typical responsibilities of Customer Service Representatives (CSRs) in their interactions with customers?*
- *Imagine a scenario where a customer is dissatisfied with a product and expresses their frustration. How would a CSR with excellent problem-solving skills and stress tolerance handle this situation to ensure a positive outcome for the customer and the company?*
- *How might CSRs adapt their communication style when dealing with customers from different cultural backgrounds, and why is this adaptation important for effective customer service?*

Lower Level	Higher Level
Scaffold the questions to help students share their responses if required. Allow extra time for students to read aloud.	Have students create sentences using the words in bold print in the passage.

MATHEMATICS (45 min)

Relate the concept of addition and subtraction to customer service scenarios. Present scenarios where addition and subtraction are applicable in customer service contexts. Example: *"A customer buys two products, and the total cost needs to be calculated."*
Discuss how accurate calculations are vital to ensure correct pricing, change, and invoices.

Distribute the math practice handout and allow time for completion. Walk around the class and provide individual support as required.

💬 REFLECTION (10 minutes)

✔ Review the answers with the whole class. Clarify any misconceptions.

Lower Level	Higher Level
Allow extra time during the independent practice session.	Challenge students to complete the problems within 15 minutes. They can spend the rest of the time exploring Khan Academy units on two-step addition and subtraction problems.

GROUP WORK (75 min)

Tell students that they will work in groups to practice real-life customer service scenarios. They will focus on demonstrating the soft skills required for the role.

Divide the participants into groups of three. Let students know that three role play scenarios will be provided and each group will perform all three role plays with a different customer service representative for each scenario. Emphasize that each participant must actively demonstrate the assigned soft skill(s)

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during the role-play.

Encourage participants to discuss and strategize how they will approach the scenario, ensuring that all group members contribute to the demonstration of soft skills. One participant will act as an observer for each scenario and should take notes on how well the CSR demonstrated the soft skills.

Project the following scenarios.

Scenario	Roles	Description
The Tech Support Challenge	- Customer: Experiencing technical issues with a product. - CSR (Customer Service Representative): Providing technical support. - Observer: Evaluating the CSR's problem-solving approach.	The customer is facing technical difficulties with a newly purchased product. They have called customer service for assistance. The CSR's task is to identify and resolve the issue effectively. The observer should pay attention to how the CSR approaches the problem-solving process and communicates with the customer to address the technical issue.
Resolving a Billing Discrepancy	- Customer: Questioning a billing discrepancy on their statement. - CSR (Customer Service Representative): Addressing the billing issue professionally. - Observer: Assessing the CSR's communication and professionalism.	The customer noticed a billing error on their recent statement and is concerned. They are calling customer service to resolve the discrepancy. The CSR must communicate clearly, empathetically, and professionally while working to resolve the billing issue to the customer's satisfaction. The observer should evaluate how well the CSR communicates and maintains professionalism throughout the conversation.
Handling a Dissatisfied Customer	- Customer: Expressing dissatisfaction with a recent product purchase. - CSR (Customer Service Representative): Addressing the customer's concerns with enthusiasm and a positive attitude. - Manager/ Observer: Acting as a manager,	The customer received a product that did not meet their expectations and is upset. The CSR's task is to handle the situation with enthusiasm, a positive attitude, and teamwork. They can consult with the manager **if needed**. The observer should assess how well the CSR maintains a positive attitude, collaborates

		available for consultation and assessing the CSR's enthusiasm, teamwork, and conflict resolution skills.	with the manager, and manages the customer's dissatisfaction effectively.

Walk around the classroom and offer support as required.

💭 REFLECTION (15 minutes)

Ask volunteer groups to perform their role play to the class. Limit it to three performances, one for each role play. Encourage the rest of the class to provide constructive feedback. Guide a discussion on how students can practice the soft skills necessary for customer service careers in their daily lives to prepare them for these roles.

Instructor Note: The time allotted for the debrief after the group activity might not give all students a chance to share their thoughts. The independent activity that follows is designed to help each student reflect on the debrief discussions and write their thoughts down.

INDEPENDENT WORK TIME (30 min)

Instruct students to spend the next 30-45 minutes reflecting on the importance of soft skills in customer service careers, with a focus on the specific soft skills discussed in the lesson (communication, enthusiasm & attitude, teamwork, networking, problem-solving & critical thinking, professionalism).
Encourage participants to consider the following questions as prompts for their reflection:

- *Why are these soft skills crucial in customer service roles?*
- *How can these soft skills impact customer interactions and overall job performance?*
- *Which soft skill(s) do you believe you excel in, and which ones do you want to improve?*
- *Can you recall a personal experience where effective use of a soft skill made a significant difference in a customer interaction?*

Participants should write a reflective journal entry that addresses these questions. They can also share personal anecdotes or examples to illustrate their points.
Emphasize that this is a personal reflection, and participants are encouraged to be honest and introspective.

After the allotted time, ask participants to share their reflections with a partner or small group (if desired) to discuss their insights and learn from each other's perspectives.

Lower Level	Higher Level
Provide sentence starters for students.	Encourage students to think about how these skills can be highlighted in a cover letter or an interview and jot down their thoughts.

WRAP-UP & REFLECTION (15 min)

Review the key points covered during the lesson: the importance of customer service, relevant soft skills, and their impact. Encourage students to apply these insights to their own interactions and future career aspirations.

Distribute exit slips to students.
Ask for a few volunteers to share their reflections.
Collect and review the answers.

Math Practice

Directions:
- Solve the problems using addition and subtraction.

1. A Customer Service Representative is assigned a daily goal of making 60 calls to customers. If they have already made 32 calls, how many more calls do they need to reach their goal?

2. A CSR keeps track of their daily call totals for a week: Monday (45 calls), Tuesday (38 calls), Wednesday (51 calls), Thursday (42 calls), and Friday (36 calls). What is the total number of calls they made during the week?

3. If a customer purchased a chair for $45 and a table for $78, what is the total cost of the furniture?

4. If a customer pays $50 for a lamp that costs $36, how much change should they receive?

5. In the morning, a store received an order for 2 desks and another for 3 chairs. In the afternoon, they received an order for 4 lamps. How many items were ordered in total today?

6. A call center sets a daily goal of 50 calls per CSR. If there are 6 CSRs working today, how many calls do they need to make collectively to meet the goal?

7. A customer service department receives surveys from customers about their recent experiences. If 35 surveys were completed on Monday and 45 surveys on Tuesday, how many surveys did they receive in total for those two days?

8. A CSR received 58 customer inquiries on Monday and successfully resolved 32 of them. On Tuesday, they received 48 inquiries and resolved 25 of them. How many inquiries did the CSR resolve in total over these two days, and how many inquiries are still pending resolution?

Reflection Exit Slip

In one sentence, describe what you learned in this lesson.

Today, I learned _____.

Is one of the careers discussed today of interest to you? Why or why not?

I liked / did not like _____ *career because*_____

_____.

Is there anything you still need help understanding?

What's one question you have?

Circle the emoji that shows how you feel about your mastery of content in this lesson.

| Happy | Smart | Confused | Sad | Angry |