



# Maintaining Customer Service



## The Importance of Stress Management and Positive Attitudes

Trainer's Guide  
Version 1.1

Developed by the Southwest Institute for Family & Child Advocacy  
NMSU School of Social Work  
in collaboration with CYFD Protective Services

## **Acknowledgments**

The Stress Management Curriculum has been adapted and modified from the Cultivating Customer Service Curriculum created by the National Resource Center for Retention and Recruitment of Foster and Adoptive Parents at Adopt US Kids.

We thank the following people for their assistance in identifying curriculum content and methodologies.

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## Formatting of the Maintaining Customer Service Curriculum

Each trainer's guide has three sections: the trainer's guide, the participant handouts, and a PowerPoint section.

1. The ***trainer's guide*** includes:

- Learning Objectives
- Directions applying to the specific module: time frames, activity instructions, lecture notes, etc.

2. Labeled icons throughout the trainer's guide alert the trainer to upcoming activities and/or materials that will be needed. The icons are as follows:



Participant Handout



PowerPoint Slides



Training Activity



Video or DVD



Flip Chart



Amount of time for the activity



Trainer initiates applause

**LGD Large Group Discussion**

**SGD Small Group Discussion**

## Trainer Tips

### A. Be Prepared

Read the curriculum thoroughly, both the trainer's guide and the participant manual.

Review the PowerPoint slides.

### B. Prepare the Room

Prepare the room prior to the training. If possible, prepare the room the day or evening before the training.

Review the materials list.

Review the activities list in the trainer's guide to ensure that there is the correct number of handouts, training materials, etc.

Make sure the LCD projector, laptop computer, and video monitor (if applicable) are in working order.

Arrange tables, chairs, and LCD projector cart (if applicable) so that the trainer and participants are able to move about the room.

Prepare flip charts, using different colors and large handwriting. Check the flip chart from all angles of the room for visibility.

Make sure that the room is a comfortable temperature.

### C. Training

Credibility is essential. Prepare your trainer introduction with a balance of personal information with training credentials.

Good voice projection will help participants hear and can positively influence the energy in the training room.

Make good eye contact with participants.

Moving about the room, while training, helps keep kinesthetic learners engaged and helps participants feel connected to the trainer, particularly during small group discussions.

Use case examples and other real life examples to help participants connect theory to application.

Acknowledge when a participant answers a question or provides an example. If the participant answers incorrectly, be gentle with redirection.

#### **D. Dealing with Challenging Participants**

Sometimes participants will engage in sidebar conversations. This may be in an effort to clear up information they have heard. Avoid calling out the participants about the behavior. It is possible to provide redirection by standing near the participants or participant's table.

There will usually be a participant(s) eager to show the trainer and other participants their level of knowledge. Engage this person during a break and give them a specific job to do during the training.

#### **E. Losing Your Way**

Even the best trainers get thrown off every now and then. Remember to breathe, keep hydrated, and know that anxiety typically lessens with time.

## Learning Objectives

1. Understand how stress personally affects people and its impact on customer service.
2. Understand how negative customer interactions can add to stress.
3. Employ stress management strategies to minimize effects of stress.
4. Seek appropriate help to manage stress and prevent burnout.
5. Understand the critical importance of attitude in providing both internal and external customer service.
6. Practice welcoming and helpful behaviors in interactions with customers.
7. Treat customers with kindness and respect in person and on the telephone.
8. Maintain professional image and demeanor in the workplace and in the field.

## Agenda

- Introductions
- Turnover of Families and Stress
- Stress and Distress
- Burnout and Compassion Fatigue
- Break
- Attitudes, Skills and Knowledge
- The Magic of a Smile and Personal Engagement
- Managing Your Own Stress

# Maintaining Customer Service: Importance of Stress Management and Positive Attitudes

## Preparation for Training Day

1)  On the **flip chart** write:

- Welcome
- Name of training
- Name of trainer
- The following instructions:
  - **Sign in**
  - **Make a name tent**

2) Connect **Laptop** with **LCD Projector**.

3) **Place on Each Table:**

- A selection of markers, including highlighters
- Learning toys (in the middle of each table)
- An assortment of post-it notes (2 x 2 or larger)

4) **You will also need:**

-  PowerPoint Slides
-  Participant Handouts

TIME: 8:30-8:40AM or 1:00-1:10PM

(🕒10 minutes)

## A. Welcome and Review of Learning Objectives

### Preparation

#### You Will Need:

1. 📄 **Flip chart** with welcome, name of training, name of trainer, and the following instructions:
  - **Sign in**
  - **Make a name tent**
2. **Laptop with LCD Projector**
3. 🖥️ **PowerPoint Slides**
4. 📁 **Participant Handouts**
5. **On Each Table:**
  - A selection of markers, including highlighters
  - Learning toys (in the middle of each table)
  - An assortment of post-it notes

### Expectations for this Section

*This section is for welcoming participants*, setting the tone for the day and reviewing the learning objectives and agenda.

- 1) 🖥️ **PowerPoint Slide 2 *Maintaining Customer Service: The Importance of Stress Management and Positive Attitudes***

**Welcome participants.** Remind them that we will have:

- A break mid-way through the training

Point participants in the direction of **restroom facilities** and ensure them that all will be done to keep the room comfortable during the training.

- 2) **Introduce yourself.** It is crucial here to do your introduction to **establish your credibility** for this topic. **Provide a brief bio** focusing on why you are qualified to train this topic including experience in the field.

Finally, you are planting seeds about the material in this **brief introduction to the topic**. You are engaging participants emotionally in order to establish the lens through which they consider stress management.

- 3) **Ask individuals to introduce themselves as well.** You can use any number of icebreaker questions, including:

If a movie of your life were made, who would play you and who would play your family/friends/significant other?

What do you collect?

What is your favorite food?

What is your hometown?

- 4) **Remind participants of the three different learning styles:**

a) Visual

b) Auditory

c) Kinesthetic

...and talk about the **learning tools** in the training and how they will be used throughout the agenda.

- 5)  **PowerPoint Slides 3-4 –Learning Objectives and Agenda**

- 6) **Briefly review the learning objectives and agenda** for this training. Remind them that stress management needs to be incorporated into their lives on a daily basis and encourage them to begin reflecting how they can do so.

TIME 8:40-9:00AM or 1:10-1:30pm

(🕒 20 minutes)

## B. Turnover and Stress

### Preparation

#### You Will Need:

1. 📄 **PowerPoint Slides 5-8**
2. **Blank paper and pens on each table for the training activity.**

### Training Section

#### 1) 📄 **Power Point Slide 5 *Turnover and Stress***

**Remind** the participants that child welfare staff not only have the day-to-day responsibilities for life-changing decisions, but they are frequently first responders in a crisis. There are many aspects of child welfare work that are very challenging, life-changing, and unusually stressful.

**State** that the participants are likely familiar with the high turnover rate in child welfare and the stress it can cause. Turnover in the workplace and with foster and adoptive families can add to your stress and reduce your confidence in your ability to do your work effectively. It is especially complicated when a good foster, adoptive, or relative family leaves the system and a child needs to be placed in a new family.

#### 2) 📄 **Power Point Slide 6 *Turnover and Stress continued***

**Remind** participants that just as everyone has a role in serving families, everyone has a stake in maintaining them as a viable resource for the children who need them. Whether they work in the frontlines or business office, their work can be made more difficult and demoralizing when the families and the colleagues they work with are in crisis or leave the organization.

**Explain** that the turnover of families can have a cascading effect on individuals and organizational stress and staff morale. Having good working relationships with foster, adoptive, and kinship families can be an important buffer against stress.

### 3) **Power Point Slide 7 Group Discussion**

**LGD:** Ask

- What do you think the benefits of a good working relationship are?
- What do you do to help retain new families and resource agencies?
- How might one develop good relationships with community stakeholders, including resource agencies, law enforcement, the court system and even colleagues within CYFD?
- How might one develop a good working relationship with a family?

**Trainer's Note:** Not all workers will work directly or even indirectly with foster families. SCI workers and office admin staff are also affected by turnover of both CYFD staff and foster/adoptive families. As a trainer you are responsible to include examples and engage all the participants in the discussion regardless of their specific job duties.

### **PowerPoint Slide 8 Activity: Personal Impact of Turnover**



**Training Activity**  **10 minutes**

**SGD** Divide the group into small groups (3-4 per group).

This activity is meant to underscore the points made in the previous section and demonstrate the impact that stress has on their ability to provide effective customer service.

Ask each participant to think of a time that they have lost resources including a good foster or adoptive family, a resource agency, or other community stakeholder and to share this instance with their small group. When discussing the loss, **ask** the participants to focus on the following points:

- How did it impact your workload?
- How did it impact your level of stress?
- Did you do anything to alleviate the additional stress? Was there enough support to handle the additional stress?
- How did it affect the children served by the organization?
- How does staff turnover affect your department's morale?
- On a scale of 1-10, with 1 being the lowest, how big a priority is it to retain families and resources in your department?
- Decide one small thing that you could do within a week, with no additional resources, to influence this priority within your office.

**Trainer's Note:** Not all participants may have been directly affected by losing a foster, adoptive, or kinship family. Ask the participants who have not had this experience to discuss a time that their work was particularly stressful due to the absence of another employee, etc.

Additionally, although not all staff may work directly with foster, adoptive, and kinship families, they may still have been affected by the loss of services. For example, processing payments or paperwork, receiving and managing complaints, having to deal with a child moving from place to place, etc. It is a good idea to have some concrete idea in advance to coach them along.

3) **Debrief** the activity by asking a representative from each group to share one or two things they decided they could do to improve retention of families.

TIME 9:00-9:30AM or 1:30-2:00PM (🕒 30 minutes)

## C. Stress and Distress

### Preparation

#### You Will Need:

1. 📄 **PowerPoint Slides 9-15**
2. 📄 **Participant Handouts**  
*Four Categories of Stress*  
*How Stress Can Affect a Person*
3. **Rubber band**

### Training Section

#### 1) 📄 **PowerPoint Slide 9 *Stress and Distress***

**Explain** that not all stress is actually bad. Stress can certainly motivate us to stretch our capabilities. Distress occurs when we are faced with too much stress. Excessive stress can have a negative impact on how we function and our relationships at home and at work.

**Pull** a rubber band to demonstrate that it can handle a certain amount of pull or stress, but it reaches a maximum point at which it can no longer and it breaks.

**Explain** that like the rubber band, we can reach a point where too much stress results in how we handle interactions with clients. It is almost impossible to provide consistent and good customer service when we are overstressed or distressed.

#### 2) 📄 **PowerPoint Slide 10 *Four Categories of Stress***

Refer participants to the 📄 **participant handout page 5** “Four Categories of Stress.”

3)  **PowerPoint Slide 11 *Survival Stress***

Survival stress occurs when one's life or health is threatened. It can include reliving a survival situation, as in PTSD.

4)  **PowerPoint Slide 12 *Internally Generated Stress***

Internally generated stress occurs when one anxiously worries about events beyond one's control, from a tense and hurried approach to life, or from relationship problems caused by one's behavior.

This type of stress can be related to one's history and genetic disposition.

5)  **PowerPoint Slide 13 *Environmental and Job Stress***

Environmental and job stress is caused by one's living and/or working environment. This can include noise, crowding, pollution, untidiness, etc. Additionally, it can include needs and demands from families, such as health issues, child disciplinary problems, or familial conflicts.

6)  **PowerPoint Slide 14 *Fatigue and Overwork***

Fatigue and overwork stress build up over long periods of time and can also occur when one tries to achieve too much in too little time without effective organizational and time management strategies. Time set aside for rest, reflection, and recreation can help prevent this type of stress.

**Ask participants** to think about which type of stress they may have in their life and why.

7)  **PowerPoint Slide 15 *How Does Stress Affect Me?***

Refer participants to the  **participant handout page 6** "How Stress Can Affect a Person".

Explain that stress can impact the body and brain, emotions and feelings, as well as behavior.

 **Training Activity**  **15 minutes**

Ask participants to put a check next to the items in the chart that affect them personally. After the participants have finished reviewing the chart, ask them to draw a picture of themselves when under stress.

When everyone has finished drawing, ask for volunteers to share their picture and describe what they drew.

**LGD:** Initiate a discussion by asking:

- When looking at the picture you drew, what do you notice about yourself when under stress?
- What effect of stress most stands out for you in this chart?
- How does stress affect your attitude, your behavior and your professionalism with foster, adoptive, and kinship families?
- How does stress affect your attitude, your behavior, and your professionalism with other staff or community members?

**Debrief** the activity by acknowledging the fact that many of us respond to stress similarly. The important thing to remember is that no one enjoys feeling stressed. Later on in the training we will discuss ways to manage stress effectively and to incorporate personal care in our lives.

**Trainer's Note:** When participants answer the questions, make sure that different roles are represented, including SCI, investigations, permanency, placement, in-home services, admin staff, supervisors, etc.

TIME 9:30-10:00AM or 2:00-2:30PM

(🕒 30 minutes)

## D. Burnout and Compassion Fatigue

### Preparation

#### You Will Need:

1. **Flipchart and Markers**
2. 📄 **PowerPoint Slides 16-18**
3. 📄 **Participant Handouts**  
*Case Study: Sandra and Sadie*

### Training Section

#### 1) 📄 **PowerPoint Slide 16 *Burnout and Compassion Fatigue***

**LGD:** Ask participants to define burnout and compassion fatigue. Write their responses on the flipchart at the front of the room.

Responses may include:

- Lack of energy for work
- Apathy
- Emotional exhaustion

Summarize the discussion by stating that burnout is a state of physical, emotional, and mental exhaustion caused by long-term involvement in emotionally demanding situations. This condition may also be referred to as “compassion fatigue.”

#### 2) 📄 **PowerPoint Slide 17 *Risk for Burnout or Compassion Fatigue***

**Explain** that the following characteristics create risk for burnout or compassion fatigue.

**Highlight** that these characteristics can be applied to staff as well as foster, adoptive, and relative families.

- Finding it difficult to say no to additional commitments or responsibilities.
- Experiencing intense and sustained pressure for prolonged periods of time.
- Having high standards that make it difficult to ask for help or delegate to others.
- Trying to achieve too much for too long.
- Experiencing a lack of control over commitments.
- Having a growing tendency to think negatively.
- Experiencing a loss of a sense of purpose and energy.
- Having an increasing detachment from important relationships.

**Trainer's Note:** For SCI staff there are additional causes of burnout and fatigue that are due to taking phone calls for 8-10 hours per day. Most calls received by SCI are reports of child abuse. The stressful nature of child welfare work is felt by all but SCI staff are in a particularly difficult situation because they are not out in the field getting to see some of the positive outcomes that field staff get to experience. **As a trainer** please pay special attention to this aspect of secondary trauma when SCI staff are present.

3) **Remind** participants that the very qualities that bring them to this work (e.g. caring for others) can make them vulnerable. Ask them to think about how caregiver families are also vulnerable.

4)  **PowerPoint Slide 18 Case Studies: Sandra and Sadie**



**Training Activity**  **20 minutes**

Assign each small group (3-5 participants per group) either the Sandra or Sadie case study and refer them to the corresponding  **Participant Handout page 7 or 8.**

**Ask participants** to read the case study and to think about the “Four Categories of Stress” and “How Stress Can Affect a Person” while reading the case studies. Ask the small groups to discuss the questions that follow their case study.

5) **Debrief** by asking for a volunteer from the small groups to summarize the case and to answer one or more question from the case study.

**Case Study Discussion Questions:**

1. What are Sandra/Sadie's strengths? What are the sources of their stress? How is stress affecting them personally?
2. How did their stress affect her ability to provide good customer service?
3. If you were Sandra/Sadie's supervisor, what would you have done to engage their strengths to help them regain their balance?

**TIME: 10:00-10:15 AM or 2:30-2:45PM**

 **(15 minutes)**

**BREAK**

TIME 10:15-10:45AM or 2:45-3:15PM

(🕒 30 minutes)

## E. Attitudes, Skills, and Knowledge

### Preparation

#### You Will Need:

1. 📄 **Flipchart and markers, prepared with two columns**
2. 🖥️ **PowerPoint Slides 19-22**
3. 📄 **Participant Handout**  
*Attitudes, Knowledge, and Skills of Good Customer Service*

### Training Section

#### 1) 🖥️ **PowerPoint Slide 19 Attitudes, Skills, and Knowledge**

The point of this section is to demonstrate how their attitude, knowledge & skills can affect customer service. If one has the right attitude and also has the knowledge and skills necessary to address a specific situation it is more likely they will have positive customer service experience.

#### 2) **LGD** 🕒 **20 minutes**

**Tell the participants** that in the previous customer service training they were asked to brainstorm positive and negative customer service experiences. Tell them they are going to do a similar brainstorming, only this time the focus should be specifically on the attitudes and skills of the individuals.

**Ask the participants to think of** their best and worst customer service experiences. This can be either when they provided customer service to someone or when someone else provided customer service to them. Think specifically how the attitude and skill of the individuals played a role in the outcome of the experience.

- 3) **Divide a flipchart** into two columns, one labeled “Attitudes” and the other “Knowledge and Skills.” Ask the participants what attitudes and knowledge and skills they identified as essential during their best customer service experiences.

4)  **PowerPoint Slide 20 *Attitudes, Skills, and Knowledge of Good Customer Service***

Refer participants to the  **Participant Handout page 9, “Attitudes, Knowledge, and Skills of Good Customer Service”** to compare the lists.

- 5) **LGD:** Ask one volunteer to share an example of a negative customer service experience. Try to find an example from within child welfare.
- 6) As a group discuss the example and how attitude affected the ability of the individual to be more responsive to the customer(s).
- 7) Ask the group what organizational supports could empower employees to be more effective in difficult situations.

**Trainer’s Note:** Trainer should be prepared with a few examples if no one from the group volunteers or the example isn’t sufficient to make the point.

8)  **PowerPoint Slide 21 *Kahlil Gibran***

Read the quote, “Your living is determined not so much by what life brings to you as by the attitude you bring to life; not so much by what happens to you as by the way your mind looks at what happens.”

Explain that this quote demonstrates the fact that we can interpret an event negatively or positively and therefore choose an attitude accordingly.

9)  **PowerPoint Slide 22 *PARIS***

Close this section with a review of the acronym (PARIS: Positive Attitudes Result In Success) as a helpful tool that can be translated in many situations. **Refer them to  Participant Handout page 10**, encourage them to hang this page up in their office as a reminder.

Explain that research shows that attitude has a direct impact on performance. Those with a positive attitude are more likely to be successful than those with a negative attitude.

**Trainer’s Note:** If there is time you can open up to group discussion on attitude and its impact on success, ask the participants to share examples from their own experience, especially when they were able to change their attitude and have a more successful outcome.

TIME 10:45-11:15PM or 3:15-3:45PM

(🕒 30 minutes)

## F. The Magic of a Smile and Personal Engagement

### Preparation

#### You Will Need:

1. 📄 Flip chart
2. 🖥️ PowerPoint Slides 23-26
3. 📄 Participant Handouts  
*Telephone Responsiveness Worksheet*  
*Service with a Smile*
4. **Video *Pleasure and Pain***
5. **Pencils** (One for every participant)

### Training Section

#### 1) 🖥️ PowerPoint Slide 23 *The Magic of a Smile*

Play video <http://www.youtube.com/watch?v=MtV5kfH4IXs> (2:16)

After the video has ended, pass out a pencil to each participant and ask them to place the pencil between their teeth as the video had shown. Ask everyone how they feel as a result.

Explain that research has shown that when we are forced to move our muscles into a smile, we actually feel better. Research studies have shown that people have found images to be happier and cartoons funnier when exhibiting a fake smile (similar to the one with the pencil in the teeth).<sup>1</sup>

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<sup>1</sup> Munger, D. (2007). *Just smile, you'll feel better! Will you? Really?* Cognitive Daily. Retrieved from: <http://scienceblogs.com/cognitivedaily/2007/11/27/just-smile-youll-feel-better-w/>

2)  **PowerPoint Slide 24 *Can You Hear a Smile?***

 **Training Activity**  **3 minutes**

Ask all participants to partner up with the person sitting next to them. Each partner will take turns with the following exercise:

One partner will close his/her eyes while the other states what he/she says when answering the telephone at work. The partner will state it twice, once with a smile and once without a smile. After the telephone statement has been made twice, the person with their eyes closed must try to determine which one was said with the smile and which was said without the smile.

3) Debrief the activity by asking if they could determine which statement was made with a smile.

**LGD: Ask** the participants:

- What did you notice about the statements made with a smile?
- How do you think this makes people feel when they hear your voice when making a phone call?

4) Explain that a smile is often the first way we engage with someone. As demonstrated in the exercise, the caller can hear our smile. Smiling over the phone is only the first step of engagement via the telephone. Personal responsiveness via telephone engagement is important.

**LGD: Ask** participants for additional examples of how engagement can occur via the telephone.

5)  **PowerPoint Slide 25 *Telephone Responsiveness***

 **Training Activity**  **10 minutes**

Refer participants to the  **Participant Handout page 11, *Telephone Responsiveness Worksheet***. Ask participants to individually review the questions and to put a plus sign (+) next to the ones they consistently complete and a minus sign (-) for the ones which need to be improved.

For each of the minus signs, ask the participants to write down at least one way they can improve the area. For example, if the person doesn't listen with complete attention when answering the telephone is it because he/she is also checking e-mail or doing other work at the same time? Ask participants to hone in on why they do not consistently show telephone responsiveness and to give concrete examples of how they can improve the area.

6) **Debrief** the personal exercise by asking for volunteers to share a few things which they do well and a few things they need to improve, with examples of how they will improve the areas.

8)  **PowerPoint Slide 26 Hospitality**

Refer participants to the  **participant handout page 12, *Service with a Smile***. Review the list of ways to be hospitable. Ask participants if they have any other examples of things they do to engage with others.

TIME 11:15-11:45AM or 3:45 -4:15PM

 30 minutes)

## G. Managing Your Own Stress

### Preparation

#### You Will Need:

1.  **Flip chart**
2.  **PowerPoint Slides 27-29**
3.  **Participant Handouts**  
*Coping Strategies for Handling Distress*  
*The Things I Will Do to Take Better Care of Myself*

### Training Section

1)  **PowerPoint Slide 27 *Managing Your Own Stress***

State that now that we've reviewed stress and the importance of positive attitude that we are now going to review personal care so that positive attitudes and customer service success will come easily.

Emphasize that personal care is an essential aspect of stress management. The first step in this is to think about what you need to do to take good care of yourself.

- LGD:** Write participants' responses on the flip chart. Ask participants:
- What do you currently do to de-stress?
  - What would you like to begin to incorporate into your lives in order to relieve stress?
  - How likely do you think incorporating the new changes will be?
  - Will it be easy or difficult?
  - What needs to occur in order for the personal care to take place?

2)  **PowerPoint Slide 28 Coping Strategies**

Refer participants to the  **Participant Handout page 13, *Coping Strategies for Handling Distress***.

**LGD:** Ask participants if the coping strategies they thought of were healthy or unhealthy.

Instruct participants to reflect on their own personal coping strategies and to write their healthy and unhealthy coping strategies in the respective columns.

3)  **PowerPoint Slide 29 Personal Care**

Refer participants to the **Participant Handout page 14, *The Things I Will Do to Take Better Care of Myself***. Ask them to take a few minutes and complete the chart with items they can begin doing immediately to take incorporate more personal care into their lives.

- 4) **Debrief** this section by asking for 2-3 volunteers to share what their new personal care items will be and how they will begin incorporating it into their lives.

TIME 11:45-12:00PM or 4:15-4:30PM

(🕒 15 minutes)

## H. Wrap-Up

### Preparation

#### You Will Need:

1. 📄 **PowerPoint Slides 30-31**
2. **Evaluations**

### Training Section

- 1) 📄 **PowerPoint Slide 30 Questions?**  
Ask the participants if they have any additional questions before finishing the training.
- 2) 📄 **PowerPoint Slide 31 Thank You**  
Thank the participants for attending and ask them to complete the evaluation before leaving for the day.