

# SDS L2C2 Instructional Design (ID) Team – Design Document

Section 1: Project Overview and Stakeholders								
Course Name	<a href="#">Customer Excellence - Dealing with Difficult Customers</a>							
Design Document Creation Date	3/22/2023							
Client/Customer	Kristan Stewart (kristrs) - Sr. Operations Manager, Tukwila WA							
Instructional Designer	Tad Dunn (dunnta)							
Target Completion Date	5/1/2023							
Target Deploy Date	5/15/2023							
What is Driving the Dates?	Customer Excellence Focus Week is 5/15/23 - 5/19/23 and site management has approval for time off floor for agents to complete training and attend workshops.							
Section 2: RACI Matrix								
	Kristan Stewart	Local HR	Site MGMT	Tad Dunn	Graphic Designer	LMS Administrator	Legal / Compliance	L2C2 ID Manager
Needs analysis	A	C	C	R			C	I
Design document/Storyboard	A		I	R	I	I	C	I
Learning Objectives	A		C	R				I
Assessment	A		I	R			C	I
eLearning module	A			R	C	C	C	I
Multimedia	I			R	C	C		I
LMS strategy	I		I	R		R		I
Rollout/Deployment strategy	A	I	C	R		I	C	I
Success Measurement/ROI	I	I	I	R				I
R	Responsible		Assigned to complete the task or deliverable.					
A	Accountable		Has final decision-making authority and accountability for completion. Only 1 per task.					
C	Consulted		Adviser, stakeholder, or SME who is consulted before a decision or action.					
I	Informed		Must be informed during/after a decision or action.					
Section 3: Key Project Analysis								
Situation – What is the training need?	Amazon's Tukwila WA CS site is reporting an increase of 106.67% year-over-year (YOY) in customer escalations specifically related to customer dissatisfaction (phone and chat interactions with CS Agents) over the last 3 business quarters. There is currently no existing customer service training on “Dealing with Difficult Customers” for CS Agents in new hire training or ongoing education. The SDS L2C2 ID Team was contacted via SIM: 0001234567 by Sr. Operations Manager Kristan Stewart to identify and implement a training solution to address this skills gap by the end of Q2 2023. Using behavioral survey evaluations related to key soft skills needed for effective customer service/dealing with difficult customers, it was discovered that over 80% of Tukwila’s CS Agents’ skill level was 0-1 (5-point scale). Data shows a significant skills gap in these key areas – Active Listening, Remaining Calm, Building Rapport, Professional Communication, Assessing Customer Needs and Proposing Solutions.							

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<b>Learning Goal</b> – What behaviors, skills or knowledge do we need to train?	<p><b>Active Listening:</b> Listen to the customer and ask action-oriented questions to identify the issue</p> <p><b>Remain Calm:</b> Allow the customer to speak and refrain from escalating</p> <p><b>Build Rapport:</b> Put yourself in the customers shoes, empathize</p> <p><b>Communication:</b> Always maintain professional communication</p> <p><b>Assess Needs:</b> Understand the customers' needs and utilize tools/resources to seek a resolution</p> <p><b>Propose Solutions:</b> Identify and propose solution that meets/exceeds needs</p>
<b>Business Impact</b> – Why is our learning goal important to the business?	Improving the CS Agents skill level in these behavior/skills areas will improve their ability to deal with difficult customers. This will lead to a reduction in customer escalations and an improved customer experience.
<b>Measurement</b> – How will we measure the business impact of this training?	Initial success of the training will be measured by completion of the training module at time of launch. We will also evaluate retention of the skills/knowledge 30 days post launch. Additionally, we will measure the reduction of customer escalations MOM and YOY.
<b>When will we measure the business impact?</b>	30 days post launch, MOM and YOY
<b>Section 4: Target Audience</b>	
<b>Audience Description</b>	Tukwila, WA Customer Service Agents - 550 total HC
<b>Audience Considerations</b> – Is there any hindrance they may have? – i.e. Internet bandwidth, training seat-time constraints, etc.	No issues as all CS Agents are US based at the Tukwila site- the week of 5/15 has been dedicated towards "Customer Excellence" and this training will be launched to coincide with the approved hours.
<b>Section 5: Learning Objectives</b>	
<b>Learning Objectives</b>	<p><b>By the end of this training, you will be able to:</b></p> <ol style="list-style-type: none"> <li>1. Actively listen to customers over the phone and chat in a difficult situation</li> <li>2. Remain calm during difficult customer situations</li> <li>3. Build rapport with customers during difficult situations</li> <li>4. Maintain professional communication with customers during difficult situations</li> <li>5. Assess the needs of customers during difficult situations</li> <li>6. Propose solutions that will meet or exceed the customers' needs during difficult situations</li> </ol>
<b>How will we measure the impact of the learning objectives?</b>	Completion of the eLearning final assessment and follow-up evaluation 30 days post launch.
<b>When will we measure the learning impact</b>	30 days post launch, MOM and YOY Continuous
<b>Resources</b>	Initial behavioral survey evaluations performed on all CS Agents 3/22/23 - Feedback from site HR, MGRs and Client/SME (Kristan Stewart), <a href="#">LinkedIn</a> , <a href="#">Indeed</a> , <a href="#">CallCentreHelper</a> , <a href="#">ServiceSkills</a> <a href="#">YouTube</a> , <a href="#">GrooveHQ</a>

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Section 6: Assessment Questions	
Question 1 – Scenario based activity	<p><b>CUSTOMER:</b>  <i>"I am REALLY unhappy with Amazon right now! My package was supposed to be delivered today! It didn't arrive as scheduled and I NEEDED that presenter remote to deliver my presentation for work tomorrow. It's now after 6pm, and I have no idea where I can get a replacement at this time. What are you going to do to make this up to me??"</i></p> <p>Select the response that BEST represents effective active listening and assessing needs from the options below.</p> <ul style="list-style-type: none"> <li>a. <i>"I completely understand you are frustrated. So, what you are saying is, your package was not delivered today as expected and you need the package for an event tomorrow, correct?"</i></li> <li>b. <i>"I completely understand you are frustrated. I'm not sure I can do anything for you here unfortunately as the driver is already gone...but let me check."</i></li> <li>c. <i>"I completely understand you are frustrated. I want to make it up to you! How about I send you a free shirt for your trouble?"</i></li> <li>d. <i>"I completely understand you are frustrated. Can you wait till tomorrow? I'm sure it will come first thing."</i></li> </ul>
Question 2 – Scenario based activity	<p><b>CUSTOMER:</b>  <i>"Yeah, that's right. I just got home from work and expected to see the package on my front step but, NOPE! I can't believe this happened. My presentation is in the morning tomorrow too! I should've known better than to trust you guys to deliver!"</i></p> <p>Select the response that BEST represents remaining calm and building rapport from the options below.</p> <ul style="list-style-type: none"> <li>a. <i>"I hear you there! I don't ever rely on Amazon to get stuff to me in emergencies. You should be sure to give it more time next go around."</i></li> <li>b. <i>"It sounds like you have had a long day and this is exactly what you didn't need to have happen. I am reaching out to the local hub in your area now to see if we can get your package redirected to you."</i></li> <li>c. <i>"I'm so sorry! You have had a rough day it sounds like, and this isn't making things any better for you!"</i></li> <li>d. <i>"I'm sorry sir, but it's not me that made your package get delayed so please, don't take out your frustration on me."</i></li> </ul>
Question 3 – Scenario based activity	<p><b>CUSTOMER:</b>  <i>"Oh yeah, I'm sure all the people at the hub are long gone and they won't care about my tiny little delivery enough to come back. That's TOTALLY gonna happen! YEAH RIGHT! But yeah, go ahead try to get a hold of them sure..."</i></p> <p>Select the response that BEST represents proposing solutions from the options below.</p> <ul style="list-style-type: none"> <li>a. <i>"Those teams work 24/7! There's always a chance they will do it, I've seen it happen!"</i></li> <li>b. <i>"Yeah, you're probably right, but what the heck you know. It's worth a shot at least."</i></li> <li>c. <i>"Great news! I was able to reach the hub manager and they let me know the driver is still in the area. They are on their way back to your address to deliver your package!"</i></li> <li>d. <i>"You know, it would be a lot easier to assist you if you weren't being so negative. Try to think positive here!"</i></li> </ul>
Question 4	<p><b>CUSTOMER:</b>  <i>"Holy cow, you are literally THE BEST! I can't thank you enough, seriously. I apologize for being so rude, you handled yourself so professionally, I'll be sure to give you some great feedback! Amazon for LIFE!"</i></p>

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	Select the response that BEST represents maintaining professional communication from the options below.  a. "You bet! Yeah, you were pretty crispy there, not gonna lie. Glad I could help you out!" b. "It was my pleasure to assist you with this. I understand how frustrating situations like this can be, so I am just happy I could help. Is there anything else I can assist you with tonight?" c. "LOL! Yeah, I get angry customers all the time so no biggie." d. "Anytime! Make sure you fill out the customer service questionnaire for me! My manager will get that, and it will look great for my review!"		
Section 7: Implementation and Deployment			
Platform(s) used for training delivery	KNET, Embark		
Deployment strategy	Training will be initially deployed 5/15/23 to all existing CS Agents with a 1-week completion requirement. It will also be included in new-hire onboarding Embark plans moving forward. This training will also be deployed 2 x annually for refresher.		
Skill/Proficiency level (1-5)	Currently 80% of CS Agents is 0-1 – Goal is 3-5		
Section 8: Deliverable Formats and Strategy			
Deliverable(s) – Description of finished product. What are we creating? – ie. PowerPoint, eLearning, Document, Video	The L2C2 ID Team will be creating an interactive eLearning training module "Customer Excellence - Dealing with Difficult Customers" complete with multimedia, interactions, assessment and feedback survey.		
Special Considerations	There will be in-person ILT workshops held at the Tukwila, WA corporate site. This training will be expected to be completed in between these workshops and daily work expectations.		
Section 9: Project Timeline and Approvals			
Deliverable	Due for review	Reviewed By	Client approval date
Needs analysis	3/22/23	ID Manager, Legal, Client - Kristan Stewart (kistrs)	3/24/23
Design Document	3/29/23	ID Manager, Legal, Client - Kristan Stewart (kistrs)	4/3/23
Final Materials	4/21/23	ID Manager, Legal, Client - Kristan Stewart (kistrs)	4/26/23
Section 10: Maintenance Strategy			
Review and Maintenance Strategy – ie. SME or Client will review content for inaccuracies yearly – ID Team will email client or SME to review on said future date	Kristan Stewart (kistrs) or someone on her team will review the training module annually and reach out to the L2C2 ID Team via SIM if any updates are needed. The L2C2 ID Team will review needed updates and implement updates to the training as needed within given timelines.		
Next Review Date	5/1/24		
Section 11: Storyboard			
Slide 1 – Introduction/title slide	Welcome to the Customer Excellence training module – Dealing with Difficult Customers		

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<b>Slide 2 – Learning Objectives</b>	<p>Tad – By the end of this training, you will be able to</p> <ul style="list-style-type: none"><li>• Actively listen to customers over the phone and chat in a difficult situation</li><li>• Remain calm during difficult customer situations</li><li>• Build rapport with customers during difficult situations</li><li>• Assess the needs of customers during difficult situations</li><li>• Propose solutions that will meet or exceed the customers' needs during difficult situations</li></ul>
<b>Slide 3 - Overview</b>	<p>NARRATOR - Welcome to the Customer Excellence training module for Dealing with Difficult Customers. Now as customer service agents, you are likely to have encountered difficult customer situations before. If not, just wait! It's not IF it happens, it's WHEN it happens. There are several reasons a customer can be difficult and lead to a difficult situation. These situations can be frustrating for not only you, but also for the customer. At Amazon, we focus on being customer obsessed! We make sure to deliver an excellent customer experience, even when things don't go according to plan. In this training, we will look at an example of a difficult customer situation and discuss the behaviors YOU can exhibit to handle situations like these and deliver an excellent customer experience.</p>
<b>Slide 4 – Active listening</b>	<p>NARRATOR - Active listening is a great way to handle difficult customers, as it shows that you care about their problem and want to help them. Acknowledge their feelings and emotions without judging or criticizing them and ask open-ended questions to clarify their needs and expectations.</p> <p>VIDEO PLAYS</p> <p>Customer – Yeah hi. I am not happy with you guys right now. My delivery came just now and it's totally not what I ordered. This was supposed to be a birthday present for my daughter. I can't believe this happened again! I want this fixed immediately.</p> <p>NARRATOR - An effective response to this using active listening would be...</p> <p>Agent – Oh no, I completely understand how frustrating that can be. So, what you're saying is that you ordered a present for your daughter's birthday and the wrong item was delivered, correct?</p>
<b>Slide 5 – Remain calm</b>	<p>NARRATOR - In some cases, a customer may be distressed or angry about their situation and take it out on you over the phone or in chat. Despite their demeanor, it's important to stay calm and respond professionally. Responding to angry customers using calm and professional responses helps to highlight their escalated language and behavior. Most times, simply realizing they are not behaving professionally will de-escalate their behavior.</p> <p>Customer – Umm yeah, that's exactly what I said but what the heck are you going to do for me here?? My daughter's birthday is tomorrow, and the art set I was supposed to receive is what she has been asking me for all year. I REALLY want to give her the art set she wants, but instead of the art set I ordered, I received a flipping sketch book!</p> <p>NARRATOR - An effective response to this remaining calm would be...</p> <p>Agent – Ok, understood. Let me look into this for you and see if we can get you taken care of right away...</p>

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<b>Slide 6 Building Rapport</b>	<p>NARRATOR - Put yourself in the customer's shoes. Echo the source of their frustration and show that you understand their position and situation. If you can empathize with a customer's problem, it will help calm them down. Build rapport by identifying with their situation and share your similar experiences with them. Sharing similar experiences makes you relatable and easier to talk to, even over the phone or chat.</p> <p>Agent – I remember when I bought a Lego set for my niece's 5<sup>th</sup> birthday, and when she opened it up, there were missing pieces! Luckily, we bought it from Amazon, and they replaced the Lego set immediately. I am confident we'll be able to get your daughter's present in time for her birthday tomorrow.</p>
<b>Slide 7 – Assess their needs</b>	<p>NARRATOR - Utilizing the tools, you have to help the customer, work to identify a solution by assessing their needs and make the solution your focus.</p> <p>Agent – Ok, so I am looking at our logs and I think I see what happened. Give me just a moment to verify what I am seeing here on my end, but I believe I will have a solution for you pretty quickly.</p> <p>Customer – Seriously? Oh wow...thank you for looking into this for me. I appreciate it!</p>
<b>Slide 8 – Propose a solution</b>	<p>NARRATOR - Once you have diffused the situation and have assessed their needs, you need to propose a solution utilizing the tools at your disposal that meets or exceeds the customer's needs. Explain the situation to the customer, let them know the solution you identified and if possible, provide a solution that also exceeds their needs. Customer obsession!</p> <p>Agent – Alright, great news! I was able to confirm that your daughter's art set is still in transit to you. There was a situation at the hub where a duplicate label was printed and was placed on the art set and the sketch book that you received. You should see the art set arrive later today and as for the sketch book; you can keep it! I'm sure it will make a fantastic addition to your daughter's art set.</p> <p>Customer – Are you kidding me? That's amazing! I totally was expecting to be out of luck here. Thank you so much!</p> <p>Agent – Of course. I'm glad I was able to help make your daughter's birthday special for her. Is there anything else I can assist you with today?</p>
<b>Slide 9 – Wrap up</b>	<p>NARRATOR - By actively listening to customers over the phone and chat, remaining calm, building rapport, assessing the needs of customers and proposing solutions that will meet or exceed their needs, you can be sure to deliver excellent customer experiences, EVEN in difficult customer situations.</p> <p>Not every situation will be as cut and dry as the one you saw in this training. For instances where you are unable to diffuse the situation and there is no solution that you can identify, loop in a peer or your supervisor.</p>

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<b>Slide 10 - Conclusion</b>	<p>You've reached the end of the information portion of this module. You should now be able to:</p> <ul style="list-style-type: none"><li>• Actively listen to customers over the phone and chat in a difficult situation</li><li>• Remain calm during difficult customer situations</li><li>• Build rapport with customers during difficult situations</li><li>• Assess the needs of customers during difficult situations</li><li>• Propose solutions that will meet or exceed the customers' needs during difficult situations</li></ul> <p>If you are ready to proceed to the assessment, click the NEXT button. If you would like to review the training again, click the REVIEW button.</p>
<b>Final Assessment</b>	Final assessment outlined in SECTION 6