



REMEMBER **me**

LEADER GUIDE

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Contents

Session 1

Introduction	1
Chapter 1: What's in a Name?	29
<i>Warm-up Activity</i>	33
<i>Video Script – Segment 1</i>	36
<i>Exercise 1</i>	38
<i>Assignment 1</i>	40
Chapter 2: Roadblocks to Remembering	43
<i>Video Script – Segment 2.1</i>	47
<i>Exercise 2</i>	50
<i>Video Script – Segment 2.2</i>	52
<i>Exercise 3</i>	54
Chapter 3: The Customer Experience	57
<i>Video Script – Segment 3</i>	61
<i>Exercise 4</i>	63
<i>Assignment 2</i>	65
Chapter 4: Customer Expectations	67
<i>Video Script – Segment 4</i>	71
<i>Exercise 5</i>	74
<i>Assignment 3</i>	76
Chapter 5: How to Remember and Use Names	79
<i>Video Script – Segment 5</i>	85
<i>Exercise 6</i>	89
Session 1 Review	95

Session 2

Chapter 6: What to Remember and Why	99
<i>Video Script – Segment 6.1</i> -----	102
<i>Exercise 7</i> -----	104
<i>Video Script – Segment 6.2</i> -----	106
<i>Exercise 8</i> -----	108
Chapter 7: Techniques for Remembering and Using Names	111
<i>Video Script – Segment 7</i> -----	116
<i>Exercise 9</i> -----	119
<i>Assignment 4</i> -----	121
Chapter 8: Name Etiquette	123
<i>Video Script – Segment 8.1</i> -----	126
<i>Exercise 10</i> -----	128
<i>Video Script – Segment 8.2</i> -----	130
<i>Exercise 11</i> -----	132
Chapter 9: Defusing Problem Situations	135
<i>Video Script – Segment 9</i> -----	138
<i>Exercise 12</i> -----	140
Assignment 5: Role-play	142
Assignment 6	147
Chapter 10: In Conclusion	149
<i>Video Script – Segment 10</i> -----	150
Session 2 Review	151

Introduction

Congratulations! You're a Remember Me Group Leader. Now, honestly, you may be thinking, "Why me? Don't I already have enough to do?" That may be true, but there may be nothing quite as important as this.

You've been selected to help yourself and those around you to succeed at work and life, and to help your organization as well.

If you've never done this before, you're probably a bit nervous. There's a good amount of material. It's natural to feel some stage fright. (Generally, most of us feel a bit insecure speaking to other adults.)

Relax! The material is well organized. The participants know less about it than you do so no one is going to question your knowledge. Besides, the participants do much of the work themselves. Finally, simply leading this session will help you overcome that stage fright. When you properly prepare for your role as Group Leader, you'll find people praising how well you've performed.

So relax. This is easy, and it's well worth it to you, the organization as a whole, and especially the customers.

Remember Me is a structured approach to dramatically improve the ability of employees to remember and retain information, including remembering and using names. By increasing customer service skills and reinforcing the policies that support Remember Me, you will consistently see higher quality results produced. You will improve customer relations, generate more income and reduce confusion and customer conflicts.

Remember Me will have a strong, powerful impact on workforce performance. Support and committed participation from you and your co-workers essential. This Leader's Guide is designed to provide the tools you need to generate that support.

Objectives of Remember Me

The Remember Me program will teach you how to look at things differently. You will understand the importance of analyzing yourself, your actions, and your job performance. You will evaluate how you relate to customers and what you might want to remember about them. We want you examine your experiences on the job and as a customer. How do you feel when someone remembers you, or just as important, how do you feel when someone doesn't remember you?

In this program you will learn the importance of a name, about the roadblocks to

remembering and using names, the significance of your customer's overall experience, how to remember and use names, what you should remember and why, tools you can use to remember and use your customers' names, proper name etiquette, and how remembering and using a name can help defuse problem situations.

To achieve these objectives on and off the job, Remember Me training should be conducted in a systematic, organized manner. At the same time, Remember Me sessions should be relaxed and informal, for you as well as for the participants. The program is designed for training between 8 and 15 participants and each session should be roughly 2 or 3 hours long (3 or 4 hours in developing countries).

If at all possible, an executive, manager or supervisor should lead the Remember Me training sessions. Employees find that their relations with the Group Leader will be improved by the frank, open approach of the Remember Me program. They'll appreciate the interest and enthusiasm you bring to the discussions, and they'll translate your interest and enthusiasm into very personal terms. By giving the tangible evidence of your personal interest in helping your co-workers improve themselves, you're showing that you really care about them as people and value their superior skills.

Because Remember Me training will help all employees, we recommend that everyone be invited to participate—including new and experienced personnel. Plan to take at least 2 or 3 hours (3 or 4 hours in developing countries) for each group session to give participants the discussion time they'll want and need to explore Remember Me. There's enough material in each group session to give you and your co-workers plenty of stimulation for constructive group discussion. The more everyone participates in the discussions, the better everyone will understand, remember, and apply Remember Me.

Program Components

The Remember Me program has three components:

1. *Two DVDs (totaling approximately 45 minutes for the entire program)*
2. *Leader's Guide*
3. *Remember Me Participant Package (Participant Book, Technique Card, Certificate of Completion, Performance Standard).*

Video

The video corresponds to the program by section: For instance, Section 1 on the video corresponds to Section 1, "Introduction" in both the Leader's Guide and the Participant Book. Every section of the program has at least one video segment. The tables on page 19 illustrate the relationship of video segments, Leader's Guide material, and Participant

Book material and exercises.

At the end of each video segment, the facilitator is directed to turn off the video and turn to the next exercise or activity.

The video, shot on location at various businesses, features realistic, everyday scenes of employee situations and interactions.

Leader's Guide

The Leader's Guide is divided into 11 parts: The Leader's Introduction and 10 training sections.

Introduction (Leader's Guide Only)

Chapter 1: What's In a Name?

Chapter 2: Roadblocks to Remembering

Chapter 3: The Customer Experience

Chapter 4: How Memory Works

Chapter 5: How to Remember and Use Names

Chapter 6: What To Remember and Why

Chapter 7: Techniques for Remembering and Using Names

Chapter 8: Name Etiquette

Chapter 9: Defusing Problem Situations

Chapter 10: In Conclusion

The introduction provides you with the information you need to get the program up and running effectively.

The Leader's Guide includes:

- *A complete transcript of each video segment*
- *All assignments, exercises, and in-class activities*
- *Suggested leader text or key points for the leader to cover*
- *Sample or likely participant responses to questions and activities*
- *Implementation suggestions and training hints*

For each exercise, the leader is provided with suggested text or key points, the actual text of the exercise questions as printed in the Participant Book, additional follow-up questions, a place for recording sample participant responses to questions, and implementation suggestions.

Order of Material in the Leader's Guide

Within each section, the material appears in the following order:

1. *Participant Book material (taken directly from Participant Book)*
2. *Video script with approximate running time*

3. *Numbered exercises (occasionally an exercise or activity also precedes a video segment)*

Types of Exercises and Activities

1. *Numbered exercises follow each video segment. Through discussions and activities, these exercises reinforce and instill the main content of the program and relate directly to the accompanying video segments.*
2. *Skill practice activities – may be the best way for participants to learn the material and to have fun at the same time.*

Types of Questions and Assignments

Throughout Remember Me, the following method is used to distinguish the kinds of questions the leader will ask participants.

- *Questions in the form <Participant Book Question #> correspond to questions that are written out within numbered exercises in the Participant Book.*
- *Questions in the form <Discussion Question> refer to questions that are not written out within numbered exercises in the Participant Book and may include follow-up questions and introductory questions. Participants will not have these questions in their books.*
- *The Participant Book contains Assignments at the end of several of the reading sections. Participants are asked to complete these assignments as part of the work between sessions.*

When going over numbered exercises, the Group Leader is encouraged to refer participants to specific Participant Book questions by question number.

Participant Book Material

At the beginning of each section in the Leader's Guide are several pages of text introduced with the label, "Participant Book Material." This indicates that all of this material is also included in the Participant Book. This label is used throughout the program. The material is reprinted for your convenience so you don't need to flip back and forth between the Leader's Guide and the Participant Book during training sessions.

The Participant Book material is rich in examples, illustrations, and strategies that support and expand upon the video segments and exercises in each section. As a Group Leader, you can take advantage of this material when introducing new topics or when providing answers to participant questions.

Participant Book

The Participant Book is the activity guide and resource for each participant who goes through the program. It includes more than 105 pages of techniques, strategies, exercises, activities, and assessments. Like the Leader's Guide, the Participant Book is divided into sections. Each section includes introductory and resource information to supplement and expand on material presented in the video segments. Also included are all program exercises and suggested assignments, optional exercises, skill practice, etc.

The Participant Book is often referred to throughout the program but, because of time, participants may not be able to completely read it. Make notes throughout the Leader's Guide that reference the Participant Book – then refer participants to the Participant Book when you think important ideas can support their learning. The participants will be asked to complete all of the exercises and assignments throughout the Participant Book and the necessary page numbers for each activity are included in the Leader's Guide for easy navigation.

The Participant Book serves as an ongoing reference and resource long after the training is over. By referring participants to specific pages in the book, you create awareness of the wealth of information it contains. Participants are urged to take advantage of the interactive benefits of the program by writing in their books and using them fully. Participants are likely to refer back to the step-by-step tips and techniques when needed.

All of the print and video materials in Remember Me are copyrighted and may not be reproduced in any form. The Participant's Book represents a license for one employee to experience the Remember Me Training Program.

TAKE ADVANTAGE OF THE PARTICIPANT BOOK
THE PARTICIPANT BOOK MATERIAL IS RICH IN EXAMPLES, ILLUSTRATIONS, AND STRATEGIES THAT SUPPORT AND EXPAND UPON THE VIDEO SEGMENTS AND EXERCISES.

ALL OF THE PRINT AND VIDEO MATERIALS IN REMEMBER ME ARE COPYRIGHTED AND MAY NOT BE REPRODUCED IN ANY FORM.

Leader's Guide at a Glance

The following section provides sample formats of the main components of the Leader's Guide.

ADJACENT EXAMPLE BOX 1

EACH SECTION BEGINS WITH PARTICIPANT BOOK MATERIAL. EVERYTHING FROM THE PARTICIPANT BOOK IS INCLUDED IN THE LEADER'S GUIDE. PROSE SECTIONS ARE INTRODUCED WITH THE HEADING: "PARTICIPANT BOOK MATERIAL."

PARTICIPANT BOOK MATERIAL:

Chapter 1: What's In a Name?

Welcome!

Congratulations on being selected to participate in Remember Me, a valuable training program designed to help you focus on remembering your customers and to help build lasting, beneficial relationships. The lessons and techniques described in this program can help you improve your memory and recall, increase the level of care you provide to your customers, and improve your overall job performance. In addition, this program offers a management strategy to help differentiate your organization from others in a competitive marketplace.

ADJACENT EXAMPLE BOX 2

THE FULL TRANSCRIPTS OF THE VIDEOS ARE INCLUDED IN THE LEADER'S GUIDE.

VIDEO SCRIPT OF SEGMENT #4

NARRATOR: Your customers' experiences are influenced by the expectations that they have when they interact with you and your organization. Some customers have extremely low expectations based on poor previous encounters. Other customers have high expectations that you will go above and beyond to see to their needs.

Customer 1: (Speaking to camera): It makes me feel more important when someone remembers my name. It makes me feel respected, and I try to do the same.

Customer 2: (Speaking to camera): How could I ever expect someone I meet once to remember my name? If they forget me, I'll just tell them my name again.

ADJACENT EXAMPLE BOX 3

SUGGESTIONS FOR LEADER'S TEXT ARE PRINTED INSIDE SHADED BOXES.

LEADER TEXT: Welcome to the Remember Me Training Program. For those of you who don't know me, my name is (YOUR NAME), and I'll be acting as Group Leader during this training session. As Group Leader, I'll be providing some framework for our discussions, but each of you will be helping one another as we go along.

Now that you know me, I'm going to have each of you introduce yourselves, but a little differently. You each have a piece of paper in front of you and some markers on your table.

First, I want you to write down your first name, or name that you go by, at the top of the page, and make it really big.
(Wait for the participants to write their first names.)

Exercise 7:

Format: Large Group
Equipment Needed: NONE

Purpose of Exercise 7: To show the participants the importance of establishing multiple connections of information with a customer.

Participant Book Question 1: How do you think the employee handled the encounter with the customer during the previous scenario? What did the employee do right? What did the employee do wrong?

(The employee handled the situation extremely poorly. First he responded to the employee with a rude greeting and then he wasn't very helpful because he did not make the connection between the loan specialist and the customer. The employee was correct in going to ask for help, but outside of that, most of his actions were incorrect.)

Participant Book Question 2: How did the employee's service skills affect the customer's attitude and overall experience?

(The customer seemed very shy and impetuous before asking the initial question and the greeting of "what" from the employee was probably not reassuring. The employee's lack of knowledge about the company, proper etiquette and concern for what the customer said (that the customer would be outside) provide an unsatisfactory experience. Those are a few reasons why the customer probably waited outside, instead of inside, if he was waiting at all.)

Participant Book Question 3: What could the employee have done differently to affect the outcome?

ADJACENT EXAMPLE BOX 4

ALL EXERCISES FROM THE PARTICIPANT BOOK ARE INCLUDED IN THE LEADER'S GUIDE.

ADJACENT EXAMPLE BOX 4

HINTS AND NOTES FOR FACILITATORS ACCOMPANY THE EXERCISES.

ADJACENT EXAMPLE BOX 4

DIRECTIONS AND SPECIFIC QUESTIONS FOR EACH EXERCISE ARE ENCLOSED IN SHADED BOXES. QUESTIONS LABELED "PARTICIPANT BOOK," AS IN "PARTICIPANT BOOK QUESTION 1)," CORRESPOND DIRECTLY WITH THE SAME NUMBERED QUESTION IN THE PARTICIPANT BOOK.

ADJACENT EXAMPLE BOX 4

QUESTIONS ARE FOLLOWED BY SAMPLE PARTICIPANT RESPONSES IN PARENTHESES, AND BY ONE OR MORE BLANK LINES FOR THE FACILITATOR TO ADD ADDITIONAL SAMPLE RESPONSES OR NOTES.

Preparing for the Session

Conduct the Remember Me program in a comfortable, well-ventilated room or space, with plenty of light. Select a room that is large enough to allow the participants to stretch out a bit. A comfortable group will be far more receptive to the Remember Me message. Make sure the program is free of interruptions so you and the participants won't be distracted. This is particularly important if you're a manager or a supervisor who tends to have many people trying to reach you. During Remember Me you will be creating a learning mood, which can be easily compromised by interruptions. Make sure that all participants have pencils and pens and highlighters.

Locate and test out the video equipment that you'll be using for Remember Me. The program is available on DVD, so be aware of which type of equipment you will need to have on hand for your training session. Avoid equipment with inferior speakers or poor resolution. Technical flaws like these will distract the participants.

Allow plenty of room for the equipment that you'll need. Even if you know all of the participants on a first-name basis, make nametags or table tents so everyone can see all the participants' names. During the sessions, it's very important to address the participants by name to establish a warm and friendly environment.

Make certain that each participant has his or her own personal copy of the Participant Book. You and the participants will be referring to it frequently, so be sure to read the appropriate sections and complete assignments before the program.

Ensure that you, as the Group Leader, can be heard by everyone. Speak clearly and distinctly without straining your voice. Don't allow participants to gravitate toward the back of the meeting room.

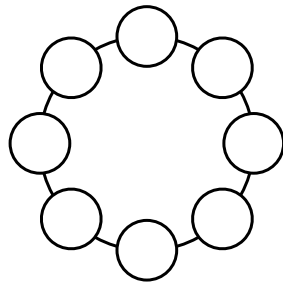
Here's a checklist to follow in planning the effective implementation of Remember Me.

- *Discuss the implementation of the training program with the organization to determine the desired results and outline any changes to policy that should take place prior to bringing Remember Me to the workforce.*
- *Announce the program session in written form for a specific time and place. Be sure to start on time and end on time.*
- *Select a meeting room where people can be comfortable and not be interrupted.*
- *Check the meeting room and the video equipment prior to each session. You may wish to use a whiteboard, electronic blackboard, overhead projector, or easel and flipchart.*
- *Read the relevant sections of the Leader's Guide and Participant Book prior to the program, including the appropriate exercises.*

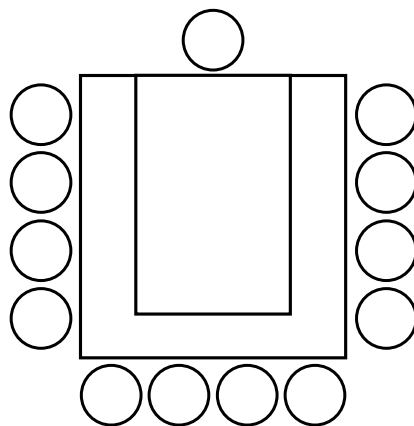
Implementation Suggestions

Audience Size

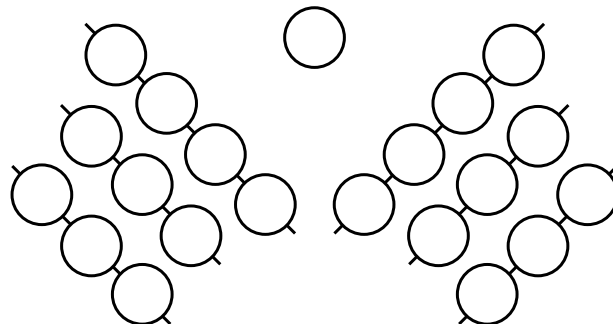
8-12 participants—ideal for new Group Leaders



12-15 participants—the optimum size



16-25 participants—fine, but requires experienced Group Leaders



Attempt to create a fun atmosphere. Decorate the meeting room with posters, if available. Provide refreshments for session breaks. Personalize the space to mirror your enthusiasm and to get the participants in a positive and sharing frame of mind.

The Art of Good Leadership

Since you will be conducting the Remember Me program, a few words about Group Leadership may be in order, especially for those of you who don't do this type of thing on a regular basis.

OPEN THE LINES OF COMMUNICATION

THERE ARE NO RIGHT OR WRONG ANSWERS TO THE REMEMBER ME EXERCISES. THE EMPHASIS IS ON DEVELOPING AN AWARENESS AND MASTERY OF THE POWER OF REMEMBER ME.

Above all, you and the participants should enjoy yourselves. Everyone will quickly be at ease during group discussions if the atmosphere is informal. The best way to achieve this atmosphere is to treat Remember Me as a positive, upbeat, supportive approach to improving job performance. Encourage everyone to speak candidly and freely.

Everyone will have valid points to make, and as the Group Leader, it is your responsibility to make certain that they feel comfortable and free to participate. There are no right or wrong answers to the Remember Me exercises. The emphasis is on opening the lines of communication and developing an awareness and mastery of the power of Remember Me.

As Remember Me progresses, gaining involvement is usually not a problem. People want to participate. But, until that natural comfort level is reached, it's important for you, as the Group Leader, to go out of your way to ensure that everyone participates. This Leader's Guide contains sample questions, virtually a "script," for the Group Leader. Screened boxes surround the Group Leader questions to make them easy to spot. These questions ensure that the group discussions have maximum impact. Additional instructions to you are printed outside the boxes.

The scripted questions also help you establish and adhere to an agenda. You should not allow the sessions to get off track. As a structured, programmed approach to quality customer relations, each portion of each session is important.

If you add material or encourage lengthy group discussions, be prepared to add one half hour or more to each session.

Don't be tempted to take shortcuts or eliminate portions of sessions. Use the Remember Me materials fully.

It is important to maintain consistency in the content and delivery of the concepts from group to group. This will ensure that all employees who complete the program have a similar (while not identical because of the breadth of different groups' discussions) experience.

You do not have to repeat the "script" word-for-word. The important role of the Group Leader is to guide the group's discussion through the principles of Remember Me. The most comfortable way to do that varies with each group and with each Group Leader. As long as the principles are covered fully, feel free to depart from the "script" occasionally.

If you want to depart from the "script," don't just ad-lib. Think about the questions you want to ask, and speak simply and precisely. Remember, you'll be communicating feelings as well as information. Relax and let your personality come through.

When leading the discussions, don't bury your nose in the Leader's Guide. Look people in the eye and scan the room while talking. The same applies to listening. When the discussions take off, you'll need to follow along and guide the conversation in the right direction. You can't do that without actively listening. It also helps to keep an open mind. Everyone is entitled to an opinion. Remember, there are no right or wrong answers. The honest exchange of viewpoints is what's right. Some Group Leaders feel comfortable standing behind a podium to conduct the session.

MAINTAIN CONSISTENCY IN THE CONTENT AND DELIVERY OF THE CONCEPTS FROM GROUP TO GROUP

THIS WILL ENSURE THAT ALL EMPLOYEES WHO COMPLETE THE PROGRAM WILL HAVE A SIMILAR EXPERIENCE (BUT NOT IDENTICAL BECAUSE OF THE DIFFERENCES IN GROUP DISCUSSIONS).

VIDEO VIGNETTES PROVIDE A FOUNDATION FOR DISCUSSION

MAKE USE OF THE TEACHABLE MOMENTS TO REFERENCE ORGANIZATION SPECIFIC SITUATIONS. CREATE AN OPEN FORUM TO IDENTIFY AND REFER PROBLEMS FOR FOLLOW UP ACTION AS APPROPRIATE.

However, this places a barrier between you and the participants. If you wear reading glasses, use them and carry the Leader's Guide as you move close to and interact with the participants. This will permit an easy flowing dialogue you and they will enjoy.

Don't worry about objections, complaints, or disagreements. It's far more important for you to maintain an open, sharing atmosphere in each session than it is to achieve 100 percent agreement. Allow the group to comment on and to answer objections. By doing so, you'll achieve the objectives of Remember Me.

Finally, keep the program moving. Don't drag it out. By achieving a comfortable, efficient pace, you'll keep participants alert and active. Good leadership requires you to stay on your toes—and a step ahead of the participants.

How to Run the Session

First, look for ways to internalize the messages presented in Remember Me. Use questions relating to problems and situations familiar to the people in your group. Job situations are probably easiest, but don't neglect examples away from the job.

Please keep in mind that the learning process, particularly in a meeting, is very fragile. Don't allow one person to dominate a session. This kind of domination threatens others, particularly subordinates or those less experienced.

NO ONE PERSON SHOULD DOMINATE DISCUSSIONS

DON'T ALLOW ONE PERSON TO DOMINATE A SESSION. THIS KIND OF DOMINATION THREATENS OTHERS, PARTICULARLY SUBORDINATES OR THOSE WHO ARE LESS EXPERIENCED.

Even the best Group Leaders will encounter problems from time to time. But any problem can be turned into an advantage and an opportunity to improve Remember Me training.

For example, what should you do about a participant who strays from the main topic? Instead of urging him or her to "get back on the track," which produces resentment and rarely works, ask the participant a specific question

on the topic under discussion: "Anthony, several minutes ago Colette mentioned that she doesn't always know how to deal with customers when she can't remember their names. What advice can you give for those situations?"

How about participants who start arguing? As we've pointed out, you, as a Group Leader, want a frank and open exchange of views. One hundred percent agreement isn't necessary. But you certainly want to avoid shouting matches. To defuse such situations, physically stand between the debaters so they can't see each other. Then, involve the entire group in the discussion by rephrasing the argument. Ask those in the group for their opinions.

At the opposite end of the spectrum, you may have participants who hold back or won't participate. Try asking questions of these people by name. Don't push too hard, but get them to talk about their own experiences and feelings, which relate to the topics under discussion. Dividing into small groups for some of the discussions may help participants feel more comfortable sharing their ideas.

General Leadership Techniques

Make certain that your group sees you not as an expert, but as a coach or facilitator to help the entire group explore these topics. At the beginning of each meeting, emphasize that each member of the group is free to share personal experiences both good and bad. Suggest that they use the program to look for answers to the questions that truly concern them.

You need to build a team atmosphere. Like any team, you and the participants will be more successful implementing the principles of Remember Me by working as a group, rather than as individuals.

SHARE PERSONAL EXPERIENCES

AT THE BEGINNING OF EACH MEETING, EMPHASIZE THAT EACH MEMBER OF THE GROUP IS FREE TO SHARE THEIR PERSONAL EXPERIENCES - GOOD AND BAD. SUGGEST THAT THEY USE THE SESSION TO LOOK FOR ANSWERS TO THE QUESTIONS THAT TRULY CONCERN THEM.

Leadership Options

As we've discussed, one of the most important things that you as a Group Leader can do to make Remember Me work is to establish the right atmosphere for the group sessions. Ideally, participants should have fun and feel good about participating. Here are some suggestions of things you can do to create and sustain that atmosphere:

- *At the start of the program divide the group into pairs. Ask the people in pairs to interview each other and then have each briefly introduce the other person to the group or assist each other with the warm-up exercise.*
- *At the start of any small group exercise, ask participants to find three people in the room that they don't usually talk to and partner with them.*
- *Break up into groups and have participants candidly discuss the barriers to remembering and using names, which they find most troublesome.*

These are only a few suggestions. The Remember Me program is flexible, but it does require participation from everyone. As a Group Leader, you know (or will come to know) your participants. Think of things to motivate them and get them enthusiastic. Don't worry about doing something a little silly; after all, Remember Me should be fun, and a good laugh is a real icebreaker.

The Art of Seminar Questioning

ASK PROBING QUESTIONS

ASK QUESTIONS AND LET THE PARTICIPANTS DO THE "LECTURING" BY THEIR ANSWERS. PARTICIPANTS LEARN BETTER WHEN THEIR FEELINGS ARE INVOLVED—NOT JUST THEIR INTELLECT.

In conducting these group sessions, try to use open-ended questions that relate to experiences your group may have encountered. Remember Me is not effectively presented by lecture or directive. Ask questions and let the participants do the "lecturing" by their answers. In this approach, the Group Leader really acts as an interviewer asking probing questions. The participants learn better when their feelings are involved—not just their

intellect. There are three steps to achieving that goal:

1. Ask “open-ended” questions, that is, questions that can’t be answered by a simple yes or no. The questions in this Leader’s Guide are examples of such questions.
2. Ask open-ended questions to the group in general, any specific person in the group, or to a “team” of persons within the group.
3. Use certain key words, particularly in questions delivered to the group. For example, ask those in the group to:
 - Tell why something is important;
 - Analyze a situation;
 - Give his or her own story to illustrate a point;
 - Solve a problem; or
 - Explain how they feel.

Remember, when in doubt, or if there is no response (or an inappropriate response), keep asking open-ended questions.

How a Leader Handles Questions

The best way to handle questions from the group is to answer with another question. Remember, the objective is to get participants to interact, and to learn from each other through that interaction. The best facilitator avoids answering questions. Here's how to promote group interaction:

- *Return the question to the questioner by rewording it, asking for specifics. For example: "Beth, you asked why Remember Me expects you to know the names of your customers. Let me ask you to share with us an example of when you faced a task that could have turned out better if you remembered your customer's name. What did you do? How did it make you feel?" Or: "Charlie, you asked why Remember Me is so important. Let me ask you how you feel when people you deal with don't remember you or use your name?"*
- *Pass the question to another participant. For example: "Ryan has asked how to use Remember Me when an organizational policy gets in the way. Jevon, it seems I saw you doing that just the other day. Can you tell us how you handled that situation?"*
- *When a participant gives a response that is out of line or that runs counter to the Remember Me strategy, don't argue or disagree. Ask another participant, whom you know would probably have a different approach, for his or her ideas. For example: "Zach, do you agree with Diana's approach?" or "Kel, could you give us your opinion on what we should do when we face situations like the ones Manny mentioned?"*

HANDLING QUESTIONS

- RETURN THE QUESTION TO THE QUESTIONER BY REWORDING OR ASKING FOR SPECIFICS.
- PASS THE QUESTION TO ANOTHER PARTICIPANT.
- WHEN A RESPONSE IS OUT OF LINE, DON'T DISAGREE. ASK ANOTHER PARTICIPANT WHO WOULD PROBABLY HAVE DIFFERENT APPROACH.

The Remember Me Participant Book – Key Element of the Program

The Participant Book is designed to explore the points covered in the videos and in the group discussions in much greater detail. Reading the book is an important part of the Remember Me program. In some cases, participants will respond far better to the written word than they will to either the videos or the group sessions.

As a Group Leader, you must emphasize the importance of the Participant Book to your group members. Certainly, there is no way that you can force them to read the sections or to complete the exercises. At the same time, there are many ways you can encourage them to do so.

- *First, read the Participant Book yourself to thoroughly understand the content. It's an invaluable resource for improving job performance and it will give you ideas to promote discussion.*
- *In the group session, make sure each participant has his or her own copy of the Participant Book. Participants should write their names in the book and complete all the assignments and exercises.*
- *At the end of each Section, ask participants to complete any assignments and discuss their answers before starting the following section.*
- *Review and discuss the Session Reviews at the beginning and end of Session Two.*

Sample Letter, Memorandum, or Notice About Remember Me

(Note: We encourage you to create a version of this notice on your organization's letterhead. Personalize it as much as possible. You may choose to hand-deliver this notice to potential participants and while giving them the notice say: "I want you to seriously consider participating in Remember Me. You're a valuable member of our team. I think the concept is great! I'll look forward to seeing you there!")

MEMORANDUM

TO: (Potential Participant's Name Goes Here)

FROM: (Your Name Goes Here)

DATE: (Use Today's Date)

SUBJECT: Remember Me

This is my personal invitation to you to join us for Remember Me. It's a program designed to help you and our entire organization embrace the concept of remembering and using the names of our customers. This program can benefit both you and our organization, and we should have some fun with it, too.

All of us, in one way or another, are important to the success of our organization. The mindset with which we approach our everyday tasks and projects have a direct effect on our interactions with our customers.

The basic concepts of Remember Me that we'll be discussing during the session can help us to change the culture of the organization. There has never been a time when empowered employees have been of such vital importance to the success of an organization! Join us to explore your role in that success.

We'll hold our first Remember Me group meeting at _____ (place) on _____ (day,) _____ (date,) at _____ (time) (a.m. or p.m.). Please confirm your availability as soon as possible. If you have a conflict, perhaps we can choose a more convenient time so that you can take part in Remember Me.

I am looking forward to exploring the dynamic job performance concept of Remember Me with you.

Sincerely,

(Your signature)

Remember Me at a Glance

The tables on pages (#) provide a quick glance reference, by section:

Participant Book Section	Participant Book Page(s)	Leader's Guide Page(s)	Video No.	Video Running Time	Exercise/ Assignment	Participant Book Page
1. What's in a name	1 - 8	29 - 42	1	0min 0sec	1	3
2. Roadblocks to Remembering	9 - 17	43 - 55	2.1 2.2	0min 0sec 0min 0sec	2 3	11 15
3. The Customer Experience	19 - 28	57 - 66	3	0min 0sec	4 Assignment 2	21 27
4. Customer Expectations	29 - 37	67 - 78	4	0min 0sec	5 Assignment 3	31 36
5. How to Remember and Use Names	39 - 51	79 - 97	5	0min 0sec	6 Session 1 Review	45 49
6. What to Remember and Why	53 - 60	99 - 109	6.1 6.2	0min 0sec	7 8	54 58
7. Techniques for Remembering and Using Names	61 - 72	111 - 122	7	0min 0sec	9 Assignment 4	65 70
8. Name Etiquette	73 - 80	123 - 134	8.1 8.2	0min 0sec	10 11	74 78
9. Defusing Problem Situations	81 - 93	135 - 148	9	0min 0sec	12 Assignment 5 Assignment 6	84 87 93
10. In Conclusion	95 - 101	149 - 153	10	0min 0sec	Session 2 Review	97

REMEMBERME: **Session One**

Objectives:

The objectives of Session One are to:

- *Define Remember Me*
- *Identify the importance of remembering a name.*
- *Explain how the brain acquires, processes, and stores information.*
- *Understand the importance of customer expectations on the overall customer experience*
- *Demonstrate the steps necessary to properly learn, remember, recognize and use customer names.*

Time of the Program:

The training program is designed to last 2 to 3 hours, and may be extended by the Group Leader.

What You'll Need:

Video equipment, monitor, and Remember Me Video (DVD).

- *Flipchart and markers.*
- *Remember Me Participant Books.*
- *Pens and highlighters for participants.*
- *Identifiers (name tags, seating chart with first names, or table markers) for each participant.*
- *Group Discussion Leader's Guide.*

Section 1:

Introduction

LEADER NOTE: Immediately below are several pages of text introduced and concluded with the label “PARTICIPANT BOOK MATERIAL.” This indicates that all of this material is also included in the Participant Book. This label will be used throughout upcoming sections of the program. The material is reprinted for your convenience so you don’t need to flip back and forth between the Leader’s Guide and the Participant Book during training sessions.

The Participant Book material is rich in examples, illustrations, and techniques that support and expand upon the video segments and exercises in each section. As a Group Leader, you can take advantage of this material when introducing new topics or when providing answers to participant questions. To begin the actual training for Session One, Section 1, go directly to the Warm-up Activity on page 33 of the Leader’s Guide.

PARTICIPANT BOOK MATERIAL:

Chapter 1:

What’s In a Name?

Welcome!

Congratulations on being selected to participate in Remember Me, a valuable training program designed to help you focus on remembering your customers and to help build lasting, beneficial relationships. The lessons and techniques described in this program can help you improve your memory and recall, increase the level of care you provide to your customers, and improve your overall job performance. In addition, this program offers a management strategy to help differentiate your organization from others in a competitive marketplace.

Remember Me means more than simply remembering a customer’s name or face. It means making an honest, human connection with someone when many others are inclined to maintain anonymity. Remembering your customers and clients is the highest level of customer service. So often customers feel overlooked and taken for granted by the cold and faceless conglomerates they patronize. They don’t feel wanted. They don’t feel that their needs are taken into consideration.

Remember Me means making the extra effort to get to know customers and to understand their needs so you and your organization can better serve them. Many people know the names of clients, customers or fellow employees, but are reluctant to use them, because they do not realize that recognition matters. In actuality, this could

not be further from the truth. The value of personalization – knowing your customers’ name and understanding their interests – is arguably the most important way to earn trust and respect.

During this program, we invite you to step back and take a long, hard look at yourself, your actions, and your job performance. Really think about the customers you serve every day. Try to visualize their faces and try to remember their names. We want you to examine your own experiences on the job and as a customer yourself. How do you feel when someone remembers you? Does it make you feel more important, even special?

Remember Me provides concrete exercises to help you better remember the names, faces, and significant personal details associated with your customers. It also explores the importance of remembering those details.

Your group leader will direct you through each section of the program and facilitate a series of discussions over the next two sessions. The success of Remember Me hinges on the openness and sincerity of each and every participant. Ask questions as often as possible, and try to provide honest answers based on your personal experiences - there are no right or wrong answers or questions.

During each section of the training, you will see a series of video presentations that depict common scenarios that you may encounter on the job. You will also perform a few written assignments and participate in valuable role-play exercises.

The Participant Book

Your Remember Me participant book guides you through each session and section of the training program. Use it to follow along, take notes, and locate presentation material and exercises. Once you complete the Remember Me training program, keep the participant book for future reference and practice.

As you watch the following scene, take a moment to think about your job, your organization, and your customers. How often do you recognize your most loyal customers? How often do you remember their names? After the video, your group leader will walk you through the following exercise:

(EXERCISE 1: - see below)

Your Name is Your Identity

A person's name is a precious possession. It carries more significance than any another word. A name does more than make someone stand out from the other faces in the crowd. It helps define a person to the outside world. It establishes an identity that everyone else can recognize.

People value their names and the capital they bring to any conversation, interaction, or relationship. People go to great lengths to protect their "good names" or to build on their reputations, or to reinvent themselves in the eyes of others.

People also love to hear their own names. More than any other word in any language, their names often sounds best to their own ears. It gives them a jolt when recognized by a friend or acquaintance. That recognition almost always generates an immediate, positive reaction that affects the upcoming experience for the better.

Think about how your interactions with customers and co-workers can change as a result of something as simple as remembering a name. When you unexpectedly and successfully remember someone's name or face, you immediately make her feel special. You tap into a powerful and valuable skill that won't go unnoticed or forgotten by your customers, your fellow employees, or top management. When you make someone feel special he becomes more likely to notice and appreciate your efforts. In addition, when you make your co-workers feel special you foster relationships that can help you down the road. They may be more likely to do you a favor or help you with a problem situation.

Most individuals do not remember the names and faces of people they do not see or interact with routinely. Introductions at meetings, short conversations at parties, a handshake with a husband or wife of a friend all seem to go in one ear and out the other.

Using Remember Me

By employing the Remember Me program, your organization recognizes a need for improvement and has chosen to put its trust in you. Your organization acknowledges the ideals and concepts presented in Remember Me. It supports the techniques the program teaches and wants you to apply them to your day-to-day job.

Remember Me examines the importance and purpose of remembering your customers' names and faces, the barriers to learning and remembering, and skills you can use to improve your memory. This program will:

- *Describe the reasons for remembering and using names*
- *Define the customer experience and how customers interpret and react to an employee who remembers them*
- *Briefly discuss how the brain acquires, processes, and stores information*
- *Recognize the important details you should remember about customers and your interactions with them*
- *Identify several techniques for remembering and using names and recognizing faces*
- *Discuss how to utilize proper name etiquette*
- *Convey how remembering your customers' names can help you defuse problem situations*

Remember Me helps improve your interactions and relationships with your customers and, as a result, it increases your job performance and your importance to your organization. Remember Me helps make you a more valuable member of your organization. When managers and supervisors see you using the skills you learn in Remember Me, they will be more likely to recognize you for advancement or promotion. Remember Me helps you to put a smile on your customers' faces and will make you a person sought out by the customer. Each participant may approach Remember Me differently but, after you finish the program, we expect the results of your efforts to positively influence your encounters with customers, your overall job performance, and your working environment.

Chapter 1 Review: Points to Remember

- *Remember Me means getting to know customers to better understand and serve their needs.*
- *A person's name is a precious possession.*
- *Most people don't remember people they do not see or interact with routinely.*
- *Remembering and using your customers' names will improve your daily interactions with customers, your job performance, and your working environment.*

Warm-Up Activity

Format: Large Group

Equipment Needed: NONE

LEADER NOTE: The Warm-Up Activity is not found in the Participant's Book

LEADER TEXT: Welcome to the Remember Me Training Program. For those of you who don't know me, my name is (YOUR NAME), and I'll be acting as Group Leader during this training session. As Group Leader, I'll be providing some framework for our discussions, but each of you will be helping one another as we go along.

Now that you know me, I'm going to have each of you introduce yourselves, but a little differently. You each have a piece of paper in front of you and some markers on your table.

First, I want you to write down your first name, or name that you go by, at the top of the page, and make it really big.

(Wait for the participants to write their first names.)

Okay, everybody finished. Now, one by one I would like each of you to stand up, show us your name and state clearly for all of us to hear "Hello, my name is _____."

Don't be shy and be sure to pay attention.

(Allow each participant to stand up, show their paper, and say their name. In addition, do the same with your name; write it down, and then show it to the group.)

Great. Now everyone turn your paper face down.

As you might be able to tell from the name of this training session, we are going to be talking a lot about remembering and using names. Now, you may not have realized it, but what we just did provided all of you with more than enough information to positively impact any customer encounter you have on the job. So, why don't you show me what you learned?

I'm going to let each of you bid on how many names you can remember from the group here and the person who remembers the most gets a little prize.

(Begin to take bids on who can remember the most names. Start with one or two, but allow the group to bid higher. Finally, allow the last person to attempt to say everyone's name from memory. After they are done, compare the results and hand out any prizes, like a mini candy bar, to the person who was able to recite the most names. It's also okay if participants win because they already know other people in the group, because that's part of remembering.)

That was great. Now, I would like you to return to your piece of paper. Underneath your first name, I would like you to write your last name AND your job or position at the organization.

(Again, allow a minute or two for the participants to write down their names and positions.)

Okay, everybody finished. Now, again, I would like each of you to stand up, show us your full name and position and state it clearly.

(Allow each participant to stand up, show their paper, and say their name and position. After all the participants are done, do the same with your name and position.)

Wonderful. Once again, everyone turn your paper face down.

Now I would like each of you to tell me how many people you think you remember. And this time you have to tell me their full name and position. And just like before, there's a prize on the line.

(Again, take bids on who can remember the most complete names and positions. This should be a little more difficult, but participants may remember more people than before since this will have been their second time through the group. After all attempts have been made, compare the results and hand out prizes. It's also okay if participants win multiple times.)

Okay, finally, we're going to do this one more time. I would like you to turn your paper back over, and write something personal about yourself underneath your job or position. It can be what your favorite movie or food is, or the name of your pet, or where you were born. It can be anything, but it has to be unique to you, so think hard. You can even draw a little picture to help illustrate your point if you want.

(Again, take the time to do this yourself as you allow a couple of minutes for the participants to complete their statements or drawings.)

Is everyone done? Okay, you know the drill. One at a time we're going to stand up, say your full name, your position and tell us something interesting and unique about yourself.

(Allow participants to stand up and state their name, position and unique fact, and then do so yourself at the end.)

Okay, last time, everyone turn your paper face down.

Now everyone who can remember 5 other people in the room, including their position, and their "something interesting" gets a small prize. If any of you can tell me everything about everyone in the room, well, I have a little bit bigger prize for you.

(Give each participant a shot to name each person, their position, and their unique fact. If there are not enough people in the group to then you can lower the initial prize number to 3. Ideally, you will pass out prizes to every participant so as not to leave anyone out. If anyone can name everyone, give them a big prize, like a full size candy bar).

It starts to get easier the third time through doesn't it? You see, there's nothing to it. You can all remember and use the names of your customers and co-workers if you really want to. You can use the types of details we just shared to create additional connections and help you remember and recognize them. I bet that if you run into each other on the job after today that you will remember one another. That's the basic principle of Remember Me.

(Take a few minutes to allow the participants to hang up their giant nametags around the room or on the table in front of them. If you sense people are still having difficulty remembering everyone, then also have them fill out a nametag or table tent and instruct the participants to try to refer to everyone by name during discussions.)

There are many reasons why we sometimes don't even ask customers for their names. It's often easier. It provides us with the path of least resistance. It often prevents us from having to create a personal connection. However, the benefits of remembering far outweigh the difficulty in utilizing it. In fact, you may already be using Remember Me techniques in a variety of ways without even knowing it. We just want to get you consciously thinking about remembering and using your customers' names everyday.

Much of what we're going to talk about won't appear new to you though the words we will use to describe it may be. The Remember Me program is based on some very basic ideas. Most of us know these concepts, but many employees often can't or simply don't practice them. With your help, Remember Me will teach us the skills we need to dramatically improve job performance to not only benefit you, but to benefit your clients, co-workers, and the entire organization.

(Distribute copies of the Participant Book as you speak.)

That's why we're here. The copies of the Remember Me Participant Book you're receiving now are yours to keep. We'd like you to read the book and complete all the assignments and exercises as we go through the Remember Me program. The material in it will help stimulate discussion and start us thinking about the concept of remembering and how it relates to our job performance.

This session will be structured around our group discussions and the video scenes we'll see. The skits in the videos were designed to get us to think about the issues presented. There will be questions based on the situations shown and on your own experiences. There are no right or wrong answers to these questions, so don't be concerned. Our goal is to look at what we're doing, and find quicker ways to complete projects and tasks.

END OF WARM-UP EXERCISE

VIDEO INTRODUCTION: The first video clips represent situations we can all probably relate to. Imagine yourself in the role of the employee and visualize this happening to you. Afterwards, we will go through the questions in Exercise 1.

VIDEO SCRIPT OF SEGMENT #1

NARRATOR: Hello and welcome to Remember Me brought to you by the Service Quality Institute. Today, we're going to help you focus on remembering your customers, to help build lasting and beneficial relationships. The lessons and techniques described in this program can help you improve your memory skills, use customer's names appropriately and often, sharpen your customer service skills, and enhance your job performance.

Your name is your identity. A person's name is their most precious possession. A name carries more weight and meaning to a person than any other word. A name does more than make someone stand out from the crowd. A name defines a person to the world. It establishes an identity that everyone else recognizes.

During this training session, we will introduce you to Remember Me, a strategy designed to help you remember and use your customers' names. Through these methods, you'll acquire the confidence and an understanding of how to make more meaningful connections with customers because you will be getting to know and appreciate them as individuals.

Remember Me means making the extra effort to get to know someone and to understand their needs so you and your organization can better serve them.

Think about how your customers would feel in these situations.

EMPLOYEE: Hi, is there something I can help you with?

EMPLOYEE: Hello, Mr. Stapleton. It's good to see you again.

EMPLOYEE: Okay, I'm going to need your name, phone number, address, and social.

CUSTOMER (on phone): I just gave all of that information to the last person. Doesn't your computer remember me?

EMPLOYEE: No, sorry.

EMPLOYEE: Mrs. Swanson, I'm glad you made it back. I still have your order here under the counter. Is there anything else I can add to it for you?

NARRATOR: How do you think you would feel if you were any of these customers? What organization would you look forward to doing business with? What would your attitude be regarding the employees who helped you?

Remember Me is all about showing your customers that you care about their needs and showing them they are important, all by simply remembering and using their names

during a transaction, encounter, or problem situation.

To provide quality customer service each and every time, you need to stay focused on your customers, and remembering and using their names is the first step.

NARRATOR: During this program you will learn how to look at things differently. We invite you to reanalyze yourself, your actions, and your job performance. Reevaluate how you relate to customers and what you might remember about them. We want you examine your experiences on the job and as a customer. How do you feel when someone remembers you, or just as important, how do you feel when someone doesn't remember you?

In this program you will learn:

- *The importance of a name*
- *Roadblocks to remembering and using names*
- *The significance of your customer's overall experience*
- *How to remember and use names*
- *What you should remember and why*
- *Tools you can use to remember and use your customers' names*
- *Name Etiquette, and*
- *How remembering and using a name can help defuse problem situations*

Your group leader will direct you through each section of the program and facilitate a series of discussions. Ask questions as often as possible, and try to provide honest answers based on your personal experiences - there are no right or wrong answers.

You may be familiar with some of the themes we will discuss and others may be new to you. In the end, we hope to provide you with the knowledge and skills you need to remember and use your customers' names -- to exceed customer expectations.

Let's begin by explaining the importance of a name. What does your name mean to you?

NARRATOR: Stop the video now and turn to Exercise #1 in the Participant Book.

END OF VIDEO SCRIPT SEGMENT 1

Exercise 1:

Format: Large Group

Equipment Needed: NONE

Exercise 1 is found on page 3 in the Participant's Book.

Purpose of Exercise 1: This exercise helps participants identify situations in the course of their own workday and forces them to think about how they use Remember Me to complete their projects and everyday tasks, if they do at all.

LEADER NOTE: To stimulate discussion early in the program, it is helpful to ask participants to write answers to questions before group discussion, depending on the time available and the make-up of the group.

Participant Book Question 1: What does your name mean to you?

(Answers should vary, as participants should have varied definitions of their names. Lead them through this answer by breaking down the importance of a name. Use this question to gauge your participants' views on the importance of someone remembering their names. Try to get participants to examine the meaning of a name and go farther in their personal definitions than just "what people call me." Why is a name important in their everyday lives? When might they encounter a situation where they would need to remember a name at home? In their free time? As a consumer? Use examples from their everyday lives to transition to a discussion of what remembering a name means to them at the workplace. Allow them to vent frustration at times if they feel like it hangs over them at work, but always temper the discussion with rational thinking. "What are the benefits of remembering a name?" "What is remembering a name worth?" "What would be the result?" etc.)

Participant Book Question 2: How are customers' reactions different depending on if the employee remembers their names?

(Using some of the responses from the previous question allow participants to discuss how an employee remembering a name can affect a customer, both positively and negatively. Try to cover every aspect of their position and refocus the group to thinking positively about how remembering a name could help establish beneficial customer relations, for the employee and customer, and what that would mean for them and the entire organization.)

Participant Book Question 3: According to the narrator, why is it important to remember a customer?

(Similar to question 2, but get more specific in regards to the benefits of remembering your customer. Even if they only use Remember Me to avoid confrontation or to avoid an annoying customer, try to identify the positive aspects of the tasks that adhere to the ideals of Remember Me. Focus on participants who already use some of the elements of the Remember Me techniques that will be discussed later to get them thinking about their job performance as a whole. This will help to get the participants to buy in to the concept, because it won't seem foreign to them. Point out those with good and bad outlooks equally, but make no judgments. Come back to these answers in later exercises that discuss Remember Me elements and how they can be expanded upon when using the complete Remember Me technique.)

Participant Book Question 4: What are some of the lessons you are going to learn through this program?

(Participants should be thinking of Remember Me as a positive at this point and should be able to provide a number of advantages. Dispel any cynical thinking.)

LEADER TEXT: By using Remember Me we are able to show our customers that we care about them and their needs. As a result we can more efficiently and effectively serve those needs. You will obtain tools that will help you to remember your customers and provide a skill-set that will set you apart from your competition. Remember Me is why we're here today and we'll get more into detail as we move through the program.

END OF EXERCISE 1