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**training software** that helps teams  
learn, practice, and Do Better Work.

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# The Better Work Guide to Customer Service Training

*Lessonly's newest guide is jam-packed with everything you need to take your customer service training to the next level. Get expert insights, customer service tips, and steps to Do Better Work.*

*Lessonly*

# Your guide to Better Work

Customer service matters more than ever. With a rapidly changing industry and ever-increasing customer expectations, it's time to rethink customer service training. If companies want to figure out how to improve customer service in the workplace—and impact their bottom line—they need to build, deliver, and measure customer service training and enablement efforts like never before.

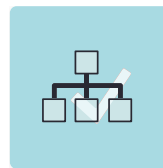
That's why we built *The Better Work Guide to Customer Service Training*. Lessonly's Better Work Method will help leaders discover how to create a customer service training program for any team. But don't just take our word for it. We worked with numerous customer service experts, thought-leaders, and practitioners to explain why training is the foundation of good customer service. Our guide also includes best practices, customer service training ideas, and other helpful resources so teams can learn, practice, and Do Better Work. Enjoy!



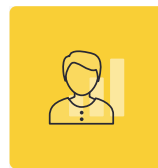
**Assess: Talk to Reps and Look at Data**



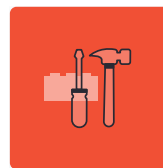
**Practice: Reinforce Service Skills and Deliver Feedback**



**Plan: Determine what Service Success Looks Like**



**Perform: Empower Reps to Do Better Work**



**Build: Work with Reps to Develop Content**



**Customer Service Training and Enablement for Enterprise**



**Learn: Push Training to Reps Where They Are**



**Free Customer Service Training Materials**

# Introduction: The foundation of great customer service

There are nearly **3 million customer service employees** in the U.S. As the face of many businesses, the customer service rep is largely responsible for the quality of service offered to customers. While many executives and leaders think that their reps are delivering great customer service, the reality is they aren't. This is a costly disconnect. U.S. companies lost more than **\$75 million in one year** because of poor service.

Delivering great customer service has many contributing factors, but customer service training lies at the heart of this challenge. Without proper customer service representative training and enablement, reps don't have the knowledge and skills they need to provide service that sets them apart from their competitors. When everyone is trained on their company's customer service standards, products and services, and processes, they're more likely to go the extra mile, deliver amazing experiences, and Do Better Work, today and for years to come.

# The future of customer service

The customer service industry is in the midst of a revolution. From AI and chatbots to data and automation, customer service leaders have to juggle their training efforts with the latest and greatest service and experience trends. Here are some of the top trends impacting the future of customer service:

## Artificial intelligence and technology

*"The keyword is automation. A customer care leader or operations leader will need to understand its context and understand how to test things. There's no roadmap for integrating automation and AI, so it'll be important to test, evaluate, and see what works best for your customer base."*

— Neal Topf, President, Callzilla

## Customer service enablement

*"We'll have some pretty cool advancements in how our agents are more than informed and more capable of providing great service. It's less of navigating all of the systems they or having access to a giant binder and more of being fed continuous training and resources that better equip them to do their job."*

— Justin Robbins, Founder, JM Robbins & Associates

## Ideal customer service reps

*"Agents are going to be the ones who handle more complex situations. They'll handle more difficult interactions and they're going to need a really developed skill set. These more complex interactions with customers also mean higher expectations that agents will need to meet"*

— Adam Toporek, Customer Service Keynote Speaker, Customers that Stick

## Data-driven processes

*"We're going to have more information about who our customers are and what they want more than ever before. We'll be armed with better data and stronger priorities. So, we'll need to execute on changes that need to be made to improve customer experience management and do it the right way."*

— Nate Brown, Co-founder, CX Accelerator

# The challenges ahead

These emerging trends also mean that customer service leaders are experiencing new challenges and greater expectations. Executives and managers have plenty of hurdles to overcome in order to enable reps to deliver service that stands out from the rest.

*"What I'm finding is that the phone is still my largest channel for consumers to reach us. It still outweighs chat, email, and self-service. We need to remember the fact that people want to interact with a human being."*

— Lisa Diehl, Manager, Consumer Advocacy – Global Retail Division, North American Consumer, Blue Diamond Growers

*"One of the biggest challenges that we have in customer service is multitasking. We're not very good at trying to do more than one thing at a time, yet we try to incorporate multitasking into customer service. This environment is unhealthy and makes it harder to get a specific task. It also increases the chance for reps to make errors."*

— Jeff Toister, Founder of Toister Performance Solutions and Author of *Getting Service Right*

*"Customers have really high expectations and are much more demanding than they were even two years ago. So, the expectation and the demand is so much higher in terms of how reps have to respond. It puts a lot of pressure on customer service teams to help and satisfy those customer needs."*

— Mike Aoki, President, Reflective Keynotes

*"The industry hasn't done a good job as a whole to develop a toolset that makes onboarding and the continuing education process really effective. A lot of contact centers simply put an agent through very basic training and a lot of it isn't even digital in format or delivery which lacks consistency."*

— Fred Stacey, GM, Cloud Contact Center Search, Outsource Consultants

*"To me, training delivery is one of the biggest challenges. It's difficult to understand what should be trained versus what should be coached. I'm convinced that there's so much training that's wasted because it's the wrong content delivered in the wrong way."*

— Thomas Siebert, Consulting Director, TBS Inc. Consulting



# 1 Assess

## Talk to Reps and Look at Data

Creating the best customer service training possible starts with an honest evaluation of your team's current efforts. You need the right data and information to make educated decisions about training. That's why the first step of the Better Work Method is to **Assess**.

Excellent assessment is all about listening to team members, reviewing data, and considering the market. The goal of this phase is to help customer service leaders identify successes and challenges in training and accurately gauge the team's learning needs. It's a crucial first step to doing better work. Here are three ways to assess your team's training program.

*"We need to make sure to meet with the subject matter experts and look at major data points. This is important to consider so we can break it down and best present new data and information to the average learner."*

— Katrina Lallo, Senior Training Coordinator, Customer Service, Moen

*"Training is the cornerstone of every customer service program. I look at the quality of the trainer, the presentation, and the content. If the content isn't good I expect feedback from the training team."*

— Thomas Siebert, Consulting Director, TBS Inc. Consulting

## Listen to your team

One of the easiest ways to gather information about your customer service team's training efforts and learning needs is to ask team members. When getting input from your team, it's important not to generalize. Instead of focusing on training for every employee, look at one role at a time to discover what frontline agents need and want. This is also a good time to gather feedback from supervisors, managers, and trainers about what things need to improve or change for that job function. This laser-focus makes it easier to identify trends for each role, rather than creating generic, non-specific training.

So, how can leaders and executives promote and elicit feedback? Consider giving every rep and agent the chance to ask questions and provide feedback at the end of every training program. Leaders can also gather feedback through anonymous surveys, one-on-one meetings, and performance reviews.

## Gather the data that matters

Leaders should use data to map, maximize, and measure their customer service team's training and enablement program. There are a variety of possible data inputs to consider when gathering information including:

- Business objectives
- Department goals
- Past individual and team performance
- Learner engagement
- Learner satisfaction
- Training KPIs
- Industry benchmarks
- Market factors

While all of these are important to consider, team leaders and trainers should determine and prioritize the insights that are the most valuable and essential to assess training. It's important to know which pieces of data are helpful, and which are just noise.

The more data inputs that are evaluated, the better the final training product will be. For example, if you get input from new agents, but not seasoned frontline agents, you might not consider creating training content that helps veteran team members progress in their career and keep skills fresh—or vice versa! It's also beneficial to reflect on upcoming organizational changes such as hiring plans and product releases to see how every angle of the business impacts training.

## Identify successes and challenges

Once leaders receive feedback from the team and review data insights, it will be easier to pinpoint their training program's successes and challenges. It's important to identify key processes and employee performance expectations then assess training in light of these to see what is and isn't working. If a team consistently meets certain performance objectives but fails to accurately solve customer problems on the first interaction, it's likely they need additional training and resources on services, products, and processes.

An effective time to highlight successes and identify challenges is during quarterly reviews. This time frame is not too long, not too frequent, but just right for training assessment. A quarterly cadence ensures every team member is enabled with the skills and knowledge they need to achieve objectives—quarter after quarter.

## Great customer service skills needed for success

*"People who are good with customers come from all walks of life. They just have to prove that they're good, adept, agile and like interacting with customers to solve their problems."*

— Neal Topf, President, Callzilla

While assessing, it's likely that teams will uncover a variety of **customer service skills** that employees want and need their customer service training to focus on. Because customer service is multi-faceted, there are a number of qualities that every top-notch customer service rep should embody. We talked to our network of customer service experts and practitioners who shared key areas that **customer service skills training** should focus on. Here are just 10 customer service representative skills to consider:

### Active listening

Understanding the customer's problem correctly and anticipating possible questions is the key to effective and successful interactions.

### Patience

Many service interactions are a result of a customer's problem or question. Customer service reps need to remain calm and work at a pace the customer feels comfortable with to create a positive experience.

### Team player

Being able to work for the good of the entire customer service team creates a positive and supportive environment. This will increase rep moral, drive productivity, and result in extraordinary interactions.

### Goal-oriented focus

Every customer service agent needs to understand their individual, team, and company goals and how their role directly impacts each. When this is clear, they're more likely to go the extra mile and do what they can to create exceptional service.

## Agility

Working in customer service is unpredictable. A strong customer service rep is ready and willing to absorb new changes, adapt to new processes, and uncover new solutions.

## Effective communication

In today's omnichannel environment, customer service reps and employees need to know how to communicate clearly both verbally and in written form.

## Problem-solving

Customers won't always diagnose their issues correctly. A great rep takes the initiative to solve the issue at hand and anticipate any future problems the customer may have and address it during the current interaction.

## Commitment to development

Working in customer service is unpredictable, so the best reps need to be committed to personal and professional development. They welcome opportunities to learn and the chance to recharge their skills over time.

## Empathy

Empathy is the ability to understand and share feelings with another person. This is critical for customer service reps who need to be able to see the customer's point of view, solve their problems, and represent the company in the best way.

## Product knowledge

The best front-line teammates need to have a deep knowledge of their company's product or service. Without knowing how these items work, just like a customer who uses it every day would, reps won't be able to help customers when they run into problems.

*"Training often isn't about [focused on] soft skills. But when you think about it, those are the things that drive customer emotion and impact the connection with the customer. The soft skills training and the ability to communicate effectively and demonstrate empathy are what's really going to make an impact."*

— Adam Toporek, Customer Service Keynote Speaker, Customers that Stick

*"Reps need to have a genuine passion for your product, your service, and your customer base. They also need to be able to adapt to change and read between the lines to navigate the gray area. It's all about their hunger to learn and willingness to lean in and do the work."*

— Justin Robbins, Founder, JM Robbins & Associates

*"The training side of things is really more of a focus on emotional intelligence, empathy skills, being able to defuse irate customers and build loyalty."*

— Mike Aoki, President, Reflective Keynotes

*"Skills that we often train for are things like listening, understanding, and the ability to take the customer's needs into consideration. But they also need to have the ability to map that to the tools, policies, and procedures in order to find a solution no matter what the customer's issue is."*

— Thomas Siebert, Consulting Director, TBS Inc. Consulting

# How to master customer service soft skills training

Despite the importance of soft skills on a customer service skills list, most training programs primarily focus on hard skills for customer service and knowledge about products, services, software, and processes. But, a blended training approach on hard and soft skills can drastically improve the quality of customer service. These customer service training ideas will help teach, reinforce, and refine **good customer service skills** to provide a superior customer experience every time.

## Storytelling

One of the most effective ways to teach soft skills is through a story. Story-based learning creates an immersive experience and allows reps to emotionally connect with the subject matter. Leaders can easily utilize a scenario-based story to convey how reps should use a particular soft skill to create a great customer experience.

## Shadowing

Consider including call shadowing as part of your new hire onboarding process. This is a great opportunity to help new hires to experience soft skills in action, spotlight your best reps, and facilitate connections between team members. When new reps sit-in on different interactions including phone, chat, and email, they gain an understanding of how and when to utilize soft skills. This also provides an opportunity for new agents to ask veteran agents in-depth questions to better understand specific skills.

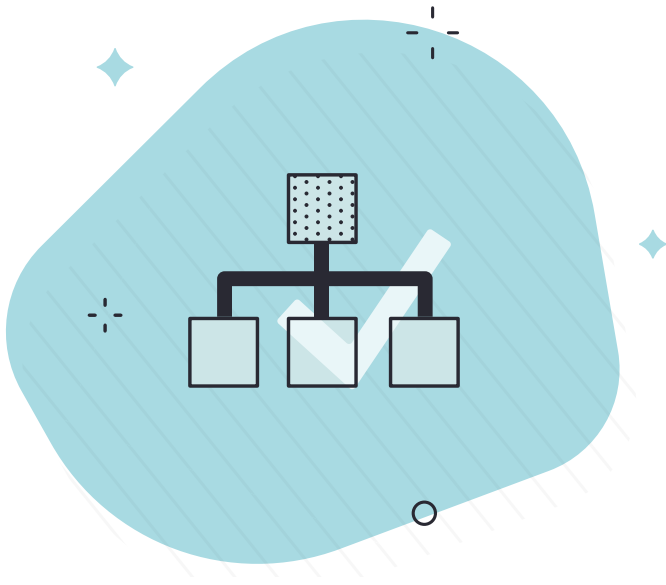
## Practice and role play

When it comes to learning soft skills, there is no substitute for realistic practice. Role-playing focuses on relevant customer challenges and mimics interactions that agents have experienced in the past. Role-playing during customer service training can be done in-person, online, or over the phone, and are a great way for agents to develop skills they need during stressful interactions without any negative impact. Role plays also give learners the opportunity to test out both soft skills and knowledge in a practical situation and turn learning into action.

Just remember, while soft skills training is important to every customer service training program, look for ways to make exercises as fun and interactive as possible. **Check out these** customer service training ideas, games, and customer service presentation ideas that offer hands-on and engaging learning opportunities for teams.

Our free **Customer Service Soft Skills** lesson walks reps through three familiar scenarios and asks them how they would respond in each.





## 2 Plan

### Determine What Service Success Looks Like

The second stage of the Better Work Method is **Plan**. Once you've assessed your training program and identified what skills are crucial for your team, it's time to make a customer service training outline and plan.

During this step, it's important to remember the true purpose of training. By following a thoughtful and deliberate process, teams can easily identify essential objectives, outcomes, and goals. So when setting goals for your customer service training program, be sure to prioritize milestones for creation and delivery. This will save your team hours of fruitless work.

*"As a trainer, the starting point is always objectives. If I'm committed to creating training, what is the objective of the training? What should someone be able to know or do at the end of this training? The second point then is to figure out what's the most effective way to get there."*

— Jeff Toister, Founder of Toister Performance Solutions and Author of *Getting Service Right*

*"You have a lot of variations on how organizations build their training teams. For some it's a shared services model, for others it sits within the contact center. Or, they use some sort of hybrid. To get the training piece right, teams need to have a really good mechanism for understanding how the customer experience is evolving and what impact that has on training."*

— Justin Robbins, Founder, JM Robbins & Associates

For many customer service teams, success includes:

- Increased customer sentiment and satisfaction (CSAT, NPS) scores
- Greater customer lifetime values
- Faster onboarding time to productivity for new reps
- Increased number of positive resolutions
- Decreased overall cost to serve
- Fewer customer escalation

## Get started with our Learning Action Plan

Lessonly's Learning Action Plan has been used by hundreds of customers to create a customer service training implementation plan, roll out engaging lessons, and put the whole team on the path to success. The Learning Action Plan guides customer service leaders through:

- Content mapping: How to transfer knowledge into training content, assigning who is responsible, priorities, and more
- Goals and metrics: How to determine what behaviors matter most
- Implementation: How to create timelines, focuses, stakeholders
- Learning summary: How to identify what content to build, before and after launch
- Quarterly sprints: How to establish goals and projects to track quarter over quarter

[Download Lessonly's free Learning Action Plan](#)

## Training and the customer service employee lifecycle

Training isn't just about onboarding—the best teams never stop learning and growing. When planning a training program, it's helpful to think and plan holistically about training across the entire employee lifecycle so your team is better prepared for success, every step of the way.

## Attraction & Recruitment

Training should be an avid part of any recruiting strategy. Make sure new reps know they'll be trained, supported, and developed throughout their time at your company.

## Development

Whether offering skill development or paths toward promotion, training opportunities should be an integral part of an employee development plan.

## Retention

Investing in rep development and long-term success creates happier employees who stick around. Meaningful development leads to better performance and promotion, which increases tenure.

## Onboarding

When people think about training, they correlate it with onboarding. Many customer service teams focus heavily on this period so reps ramp as quickly as possible.

## Separation

What happens when your best reps leave? Where does their knowledge go? **Democratized training** is key to capturing best practices and the knowledge your best team members use every day.

# Hiring all-star customer service reps

It'd be a mistake to overlook the value of hiring. While training may play an important role in the success of customer service employees, it's still vital to hire the best of the best.

Hiring for a customer service organization isn't easy. Is it best to hire for experience, talent, or skill set? Rarely will a perfect candidate show up, so it's important to know what the team values most and which traits are indicators of future success.

*"I hire talent over experience every day of the week. I believe that if you invest in strong talent it will pay off in the long run, both in terms of tenure and output."*

— Patrick Hawkins, Senior Manager of Customer Support, Virtru

*"If a person doesn't have an interest in problem-solving, helping unblock users, and getting them to see the value in a product then that's not a good fit for support."*

— Jason Pearson, Head of Product Support, Figma

*"Think about your audience first. So when you're hiring for this role, you're hiring for a very unique skill set. Many customer service departments not only have a tremendous amount of knowledge that they need to learn about the company's internal computer systems and programs, but also have the soft skills to be able to work with customers on a daily basis."*

— Katrina Lallo, Senior Training Coordinator, Customer Service, Moen

*"The first step is going to be to hire better people. Hire more for emotional intelligence, hire now looking at more complex analytical skills. With more easy questions being handled by AI bots, it's going to leave all the tough ones for the reps. So, they have to really increase in skill level."*

— Mike Aoki, President, Reflective Keynotes

# Customer service onboarding and beyond

Onboarding programs make up the majority of customer service training. These weeks are formative for a rep and can make or break their experience with a company. When designing a customer service onboarding experience, it's important to consider:

## Objectives

Drill down into tactical goals each rep will need to pursue and meet as fully ramped teammate. Some helpful objectives include:

- Ticket resolution standards post-training
- Completion of training in key categories: such as company procedures, the role of customer service at the company, technical & product knowledge, the support process, support tools, and soft skills
- Quota or rep interaction goals

## Timeline

We've worked with hundreds of teams, and we typically see customer service onboarding periods between 3-6 weeks long. This differs more for teams who do nesting periods of supervised work before heading onto the floor as a full-fledged call center or customer service rep.

While onboarding can last 3-6 weeks, a rep may not be fully ramped to productivity for months. It takes time, repetition, and investment to get a rep up to speed—which is why training is so vital. Develop a clear onboarding schedule so everyone has expectations for what reps and managers are supposed to accomplish in a given timeframe.

*"We do two weeks of training followed by two weeks of nesting. At Earnin it's a priority to make sure someone is always available when questions come up and to continually collect feedback from new employees throughout the onboarding process. When I joined the team we were hiring 50 agents every other week and we were only doing in-person training followed by hands-on activities. We needed a digital option for scale to help us keep our timeframe."*

— Amber Aslanian, Head of Customer Experience Operations, Earnin

Onboarding should be fun and engaging for every new hire.  
Roll out the red carpet for your reps with [these onboarding tips](#).



# Customer service training topic ideas

Now it's time to plan what content will need to be built for onboarding and ongoing training. When generating ideas, consider three primary topics or categories: company-wide information, department-specific knowledge, and role-specific skills. If more than just the customer service team is trained on the same process or tools, feel free to use the same company-wide training material for everyone. But, if a new rep needs to know more about service-level agreements (SLAs) with customers, that's likely part of role-specific training. As a company grows and training becomes more specialized, these good customer service categories are helpful examples to keep in mind:

## Company-wide information

*Topics everyone in the company should learn.*

1. General company information: What does your company do? What is the mission and vision? What market does it operate in, etc.?
2. Company organizational structure: How are departments and teams organized at the company?
3. Leadership team: Introduce company executives and take the opportunity to imbue tenets of culture.
4. Benefits and company-wide policies: This information should be applicable across teams. If not, move it department-specific or individual training.
5. Company Culture: What values do you want to instill in your employees?
6. **Product and Services:** What does this company sell or do?

## Department-specific knowledge

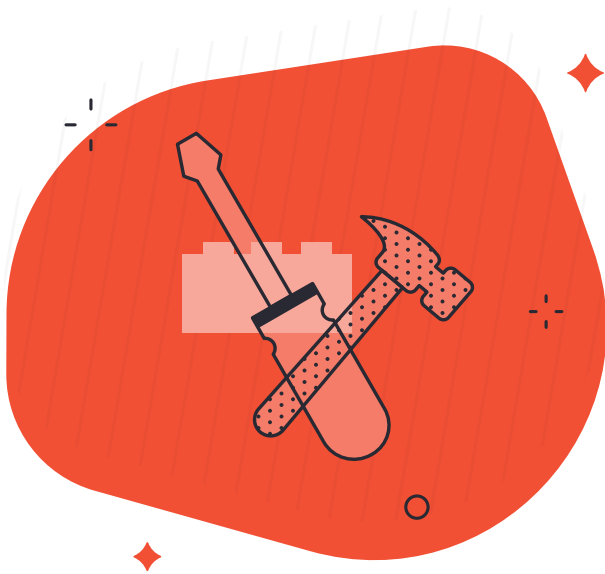
*Topics every customer service rep should learn, no matter their team or role.*

1. What role does the customer service team play in the company?
2. How is success defined on this team? What metrics will we look at?
3. How is the customer service team organized and how are teams defined?
4. What are the tools and processes all customer service teammates should know?
5. What products and services does this call center or customer service team support?
6. Customer service skills training: What are some great customer service skills to cultivate?

## Role-specific skills

*Topics that are only relevant for specific roles or small teams.*

1. What are the duties of this specific role or team?
2. What are the team and role-specific processes?
3. What tools will the employee use everyday?
4. Skills training: Both customer service soft skills and technical skills are essential, and should be tailored to the role at hand.
5. Other role-specific product knowledge



# 3 Build

## Work with Reps to Develop Content

The content of your customer service training program is everything. Without engaging, helpful, and modern training, efforts will likely fall short. That's why the next stage of the Better Work Method focuses on an important element: **Build**.

When it's time to start building your training program, remember that simply transferring information isn't helpful. It must be easy to digest, remember, and implement. Here are a few tips that any customer service team can use to quickly and effortlessly build training content that their team will love.

### Build trust with learners

Unfortunately, the word "training" often comes with a stigma of boring, useless, and antiquated. Build trust during onboarding and you'll likely see increased engagement during the rest of training.

### Build for service culture

Training content should also be built directly from the company's culture. Every piece of information should fit the mission and values of the larger company and help reps be stewards of those values.

*"Most organizations define policies and procedures. So customer service employees are trained from the beginning not how to delight customers, but how to follow policy or how to walk people through a procedure or how to use the product. It's all transactional. As a result, you're training people to be transactional service providers.*

*A company with a strong service culture explicitly defines a focus on serving the customer, a specific way of serving the customer, and keeps everyone working on the same page. There are very few organizations that do that well, but in the organizations that do, the employees know what's expected and how to interact with a customer."*

— Jeff Toister, Founder of Toister Performance Solutions and Author of *Getting Service Right*

## Building exceptional content

There's a reason instructional designers and professional trainers have been around for so long. Creating useful and helpful training content takes intentionality. There will always be a place for trainers to help lead initiatives. However, as digital training continues to mature beyond complex and antiquated LMS software, training's focus is around helpful content.

There are some key principles and customer service training tips to remember when creating in-person and online training content. Before we dive into the tactics of creation, it's important to note that we'll largely focus on creating digital content. These principles apply no matter which modern **customer service solution** is being used—and many of these items are transferable to in-person training as well.

### Clarity, brevity, usefulness

Today's employees have lower attention spans and are busier than ever. The top priority should be to create content that is clear in meaning, free from fluff, direct, and helpful. If it isn't, employee engagement will plummet. Even if training is "required," less engagement usually means less retention and less impact.

### Specializing training

Training, even within the same team and role, should look different. Group training by the needs of the customer service team makes this easier. Onboarding programs specifically serve new employees, while ongoing training on topics like new products and company procedures are targeted to the entire team.

*"User experience should always be considered. For example, if we're taking a content focus and we're telling employees to go take these three courses, that's taking time out of someone's busy day. And instead of helping them gain new skills, we're actually creating more stress because they were supposed to get stuff done today. But now they have to spend two hours on this boring required eLearning that doesn't actually help them do their job any better. That's a terrible experience."*

— Jeff Toister, Founder of Toister Performance Solutions and Author of *Getting Service Right*

*"There is an incredible amount of value in having someone who not only is a subject matter expert but is genuinely passionate about the topic."*

— Justin Robbins, Founder, JM Robbins & Associates

*"Let's say you have to create and design a training for the whole group, which includes tenured associates who've been doing this for 27 years and brand new associates who've been doing this for five months. They all need to reach the same level without feeling patronized nor in over their heads. So, you must differentiate for each learner type."*

— Katrina Lallo, Senior Training Coordinator, Customer Service, Moen

*"A lot of customer service training ends up serving the end goal of helping reps know how to make decisions around escalating customer complaints and when to solve it themselves. The training reps receive helps prevent bottlenecks throughout the organization by making them more confident and knowledgeable."*

— Katrina Lallo, Senior Training Coordinator, Customer Service, Moen

## Democratized learning—get the best reps involved

In the past, training has typically been created solely by trainers. **Democratized learning** harnesses the expertise of frontline employees to create meaningful training. This is becoming more common for customer service teams as it's a **scalable way** to capture and deploy useful knowledge for the team. Democratizing training has valuable returns for a few key reasons:

- Teammates on the frontlines of service and support work with customers every day. They have the best insights on what's working and what isn't, what customers are feeling, and which problem-solving methods are most important.
- When your best reps leave the company, where does their knowledge go? Democratized learning enables the team to capture their knowledge for future team members.
- When teammates are involved in creating training, they become more invested in team success.

## Using microlearning in online training

Presenting lengthy pieces of information during training is incredibly ineffective. Bite-sized learning, with small, focused topics, is better suited for agent training. Since contact center agents are busy fielding interactions, completing recurring tasks, and trying to meet goals, it's easier to consume training content in smaller increments during idle time.

Microlearning can also be leveraged for just-in-time training—right when a rep needs it. For example, if a rep is on a call with a customer who has a question about a warranty policy, the agent can instantly access content that holds the answer they need. These contextual training opportunities boost learning retention and provide high value and relevance to reps. In comparison, long training sessions make it harder to remember and reference the information that agents find most beneficial in their day to day work.

## Multimedia training content

Text, images, video, interactive tours, quiz questions, notecards, documents...the types of training content available online continues gets bigger every day. But what should be used? And when? The most simple answer is that different topics or goals warrant different methods—a variety of training types is usually the most effective.

If training on a new product, including video walkthroughs with interactive tours and quiz questions can help reps visualize and retain the information. If releasing new messaging, practice using the messaging via audio or video. For topics like company policies and procedures, text might be easiest and most direct but consider attaching supporting documents with more details for employees.

When creating training content, consider the following framework when it comes time to decide what type of media to use:

Learn it, see it, do it.

For example, let's say a rep takes a lesson on how to deal with an angry customer. A good learner journey for the lesson would be as follows:

- First, explain what the rep will hear from the customer
- Tell them how to respond
- Then, show an example of the correct response
- Finally, have the rep practice doing it themselves

As each section is built, different elements or interactive pieces can support each portion. Could screenshots help the rep see something more clearly? Does your **customer service training software** allow reps to practice in a training environment? It's important to take your training solution's functionality into consideration during this phase. If it doesn't allow for practice, this element may need to be done in person.

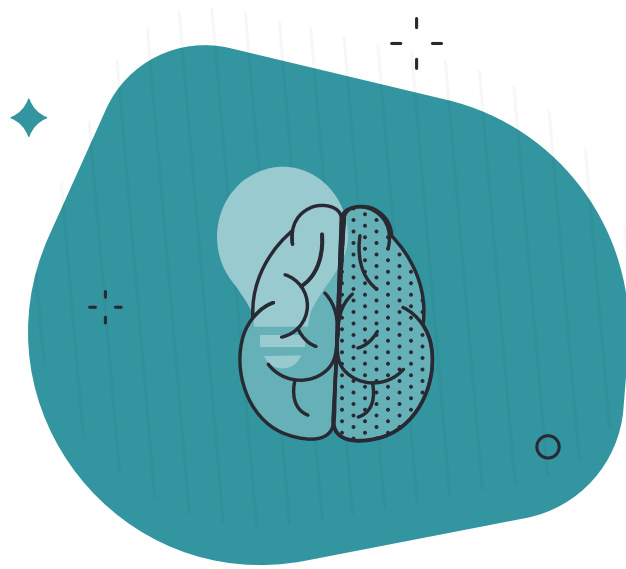
## Getting feedback—share before ready

Training should never be created in a vacuum. This is part of democratized learning, but sharing before ready goes beyond having employees create the training itself.

As seen in the Assess phase, it's important to involve a variety of team members when building your training program. Once you draft a new piece of content, share it with a test group of employees who can provide feedback. Aim for variety in this group—people with different job titles, responsibilities, tenure, and more. Sharing drafted content early makes it easier to implement changes before it's been deployed to the entire team.

## A few more building tips

- Focus on the most important 80% of the information. There will always be a minority of customer scenarios or information that is missing. Those can be added as they come up, but stay focused on the most common scenarios and skills, especially when first building a training program. This is especially important to remember during onboarding, where reps should learn the most essential information without being bogged down by every little customer question or scenario.
- If content or lessons can be split into sections, use them liberally to keep sections short. It's a much better experience to advance through a lesson than to scroll endlessly through one long section.
- Set expectations at the beginning of training. Why are reps receiving this content? How long will it take to complete? What should they know or be able to do when they finish? This sets the tone and frames the content in light of the rep's responsibilities.



## 4 Learn

### Push Training to Reps Where They Are

Once training is planned and prepared, creation begins. The next phase of the Better Work Method, **Learn**, is all about maximizing the impact of training and efficiently reaching learners. So, how can your team leverage training and deliver it in a way that fuels performance?

## Delivering training

### Contextual learning

Contextual learning is a fairly new addition to training offerings, and proactively provides the exact training content reps need. This can be done through software integrations with other tools to make reps' workflow as seamless as possible.

### Assignments

Assignments notify reps when they have an assignment and provide an easy way to reach the content. Assignments are great for required ongoing training, guided onboarding over time with multiple assignments, or to re-emphasize a piece of content the team should look at.

### Mobile learning

Online training should be accessible on mobile devices through a dedicated app or a mobile-friendly experience. This gives reps access while they're onsite with a customer, commuting to the office, or sitting in an airport.

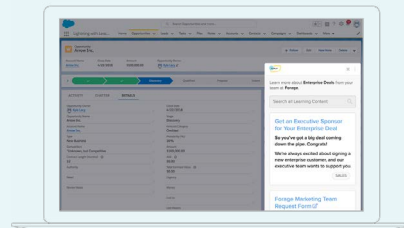
### On-demand

Access to on-demand training is a helpful feature for customer service teams. Time is less flexible for reps, so on-demand learning in-between interactions drives performance and productivity. Ideally, on-demand training is searchable, organized, and easy to consume quickly.

"A lot of information needs to be available to the agent. So, having a library, or another place where they can easily access knowledge, is very important. They don't know what their next call is going to be or what the consumer is going to throw at them—so it keeps them prepared."

— Lisa Diehl, Manager, Consumer Advocacy, Global Retail Division, North America, Blue Diamond Growers

Technology will lead the charge in contextual learning. Learn how **Lessonly for Chrome** enables reps in their moment of need.



## How to market your training program

"If you build it, they will come." While *Field of Dreams* got most things right, that logic may not exactly apply to team training. The team may take required lessons, but for meaningful adoption, training should be well-promoted and marketed internally. The goal is not to just to gain awareness but to build trust and buy-in with training. There are three levels of buy-in that serve as leading indicators of training success.

### 1. Leadership

Getting momentum for training is much easier when it comes from the top. This support provides legitimacy and conveys that learning is a priority. Many customer service leaders are forced to deprioritize customer service training because their department is viewed as a cost center rather than a profit center. This puts a strain on efficiency and detracts from customer experience and effective resolutions. But if leadership is on board, ensuring excellence will be easier.

*"The biggest hurdle I find is the leadership team, because the reps want the training and ongoing reinforcement. It's the leadership team that views training as just an initial or one-time issue."*

— Mike Aoki, President, Reflective Keynotes

## 2. Managers

Managers are often the direct line to the frontline customer service representatives. They can be a trainer's biggest promoter or worst detractor. That's why managers should have an active part in managing, creating, and reporting on their team's training. They also must have access to reports on rep performance and progress so they can actively monitor training efforts.

*"When you sit down with a manager and you're trying to fill gaps, you both have to have the same overall goal. But, sometimes you may have conflicting priorities since their role is to get a volume of daily work done and your goal is to target the quality of work by investing time away with training. There needs to be a lot of trust and managers need to understand what you're working on and vice versa. If you don't have your manager's buy-in, you're not going to get your training scheduled and done."*

— Katrina Lallo, Senior Training Coordinator, Customer Service, Moen

## 3. Learners

We've talked a lot about building trust with frontline reps. Most employees have a genuine desire to learn, feel confident, and succeed. But they're also motivated by different things—promotion, money, perks, public praise, etc. For reps who want to progress and grow, it's important to explain how training can help them reach their goals. But don't forget to listen to what reps say they really want training on. By providing content that's tied to their feedback, they're more likely to engage with and participate in training—and grow as a result.



## 5 Practice

### Reinforce Service Skills and Deliver Feedback

Training truly never ends. When customer service training is paired with intentional practice and thoughtful coaching, it's a recipe for long-term success. That's why the Better Work Method focuses on deliberate Practice that involves rehearsal, refinement, and repetition.

*"The business is changing, the products are changing, and the teams are changing. If you want a really great, up-to-date training program, it's constant work."*

— Patrick Hawkins, Senior Manager of Customer Support, Virtru

*"The business is changing, the products are changing, and the teams are changing. If you want a really great, up-to-date training program, it's constant work. But there are all sorts of needs that come about during the QA process or just as the needs of our customers change. Customers demand more today than they did three years ago."*

— Sheri Kendall-duPont, Learning and Development Manager, FCR

## Where does ongoing training fit?

A common challenge for customer service teams is finding the time for continuous training after onboarding. For the most part, reps need to be on the floor serving customers, but that focus on efficiency is an easy excuse to nix training. In the past, ongoing training meant that reps were taken off the floor to go into a classroom and train. But with the right solutions and technology, reps can learn at their own pace, between calls or tickets—or even have access to that information during customer interactions for quick reference.

Some teams dedicate a specific time block to training during the day. While this may work for some, it's hard for many teams to keep this as a priority. With online training software, trainers and enables can regularly provide assignments that reps need to complete by a certain time. Workforce management solutions can be extremely effective in helping find time for ongoing training. Since they track how employees are using their time—and can track productivity across a number of different groups—these tools can be used to find gaps where training could replace an activity or fill downtime.

*"The right technologies can definitely impact the ability to onboard and do continuous training. I've seen plenty of instances where companies have tremendous onboarding programs, but then they have nothing for the follow-up which goes against modern understanding of adult learning."*

— Fred Stacey, GM, Cloud Contact Center Search, Outsource Consultants

*"Training needs to be ongoing so you can reinforce the skills and behaviors that you want employees to exhibit. And most importantly, because this is where a lot of organizations fail with training, is it can't just be about operational skills."*

— Adam Toporek, Customer Service Keynote Speaker, Customers that Stick

## How often should ongoing training happen?

Ongoing training takes on many different forms. It could be anything from a rep quickly reviewing a lesson between calls, to an all-team, in-person practice session. Building cadences of training activities and new content creation is key to training success. Ongoing training should also help reps practice and improve their skills.

In the last section, we mentioned specialized training for certain people or roles. Ongoing training should work the same way. Reps who are falling short should receive targeted training to help them close performance gaps. Meanwhile, reps who are thriving can begin training for possible future roles. Across this spectrum, content can focus on new skills, new product releases, promotional paths, or higher support tiers. No matter the purpose, teams can provide practice and ongoing training with:

- Quiz questions in lessons
- Graded practice scenarios (via video, screenshare, or audio)
- In-person role plays with trainers or peers
- Coaching and 1:1s with managers
- Training built by peers on recent learnings

*"One-time training is like going to the gym once and then saying you're physically fit. You have to go at least three times a week to the gym to keep it up. And it's true with training as well. It can't be a one-time event. It has to be reinforced by different kinds of online training, in-person, team huddles, booster shot training, etc."*

— Mike Aoki, President, Reflective Keynotes

*"Customer service teams need to be super intentional with their on-demand training. Have a strategy. If you're moving people up for promotion or helping people who are struggling, you can have specific content tracks or things they should take during any ongoing training time. This content should be intentional and planned with purpose."*

— Alex Mislán, Services Delivery Manager,  
Lessonly Services

*"Training is not a one-time exercise. It's not start/stop. It is continuous."*

— Neal Topf, President, Callzilla

*"Leverage customer feedback to find knowledge gaps. You will notice through coaching and customer interactions that employees are struggling in a particular area. It will show in metrics like CSAT and productivity; use that data to create ongoing training."*

— Amber Aslanian, Head of Customer Experience  
Operations, Earnin

## Who owns ongoing training?

If the team has someone in charge of training or enablement, they're usually responsible for all training efforts. However, ongoing training should be a mantra for managers and reps alike—it's how they all do better work. Managers should always coach and work with reps on soft skills, review calls or tickets, and offer daily feedback for improvement. Reps also need to fuel their own learning and seek opportunities for improvement and participation.

*"If you really want to improve customer service, you need to spend quality time with your team and continue to coach. Just like an athletic team needs continuous coaching, a first-line care team needs constant coaching as well."*

— Bob Davis, Founder and CEO of Robert C. Davis and Associates

## Improve practice with effective feedback

Feedback is non-negotiable for growth. Whether through qualitative feedback from a manager or graded questions in online training software, it should always be built into a training regiment. Faster feedback loops mean more improvement. It's worth remembering that feedback doesn't always have to come from someone "above" the rep on the org chart. Peer feedback can be extremely helpful. Whether practicing together, critiquing each others' work, offering encouragement, or sharing best practices, this peer-to-peer practice is indicative of an organization committed to growth.

Company culture often determines if and how peer feedback works best for a team. If there's intense competition between a less collaborative team, peer feedback might be challenging. It will also take a concerted effort to shift the culture towards practice. It takes psychological safety for a team to feel comfortable sharing and practicing with teammates. But, it's worth the investment. Sharing feedback between reps who have direct experience working on the frontline is invaluable for growth.



## 6 Perform

### Empower Reps to Do Better Work

In the end, customer service training is about delivering results, which is why the final step of the Better Work Method is Perform. If the first five steps of the Method are thoughtfully prepared and implemented, performance will skyrocket. It should also be easy for customer service teams to identify KPIs, continuously improve, and deliver results.

Leaders need to tap into the power of data to measure the impact of customer service training on performance. This should include KPIs that measure team performance, as well as metrics that track individual progress. While there's no doubt that data is critical for customer service teams, many still focus on operational metrics and KPIs that are misleading in the modern customer service landscape.

According to Katrina Lallo, Senior Training Coordinator of Moen's customer service team, these include efficiency metrics like average handle time, average speed of answer, and the number of interactions. While they hold some value, there are other metrics worthy of consideration.

*"First and foremost, we need to have a revolution in the workforce, but until that happens and people are willing to let go of those [archaic] metrics, it's up to learning and development to make sure that people have what they need to do things we need them to do."*

— Sheri Kendall-duPont, Learning and Development Manager, FCR

Nate Brown, co-founder of CX Accelerator agrees with Sheri's sentiment, "A decision has to be made. Are we going to focus on the quality of support delivered, or are we going to continue to micromanage the quantity and really just focus on the volume and the efficiency metrics?"

So, how should customer service teams think about training KPIs and metrics?

## A better way to measure

To radically prioritize customer service and experience, leaders must evolve how they define and track success. Instead of prioritizing operational KPIs, managers and leaders should focus on data that indicates great customer service that puts the customer first. These metrics track the quality of service and rep performance. Let's take a closer look at a few:

### First Contact Resolution

FCR measures the rate at which customers' questions or problems are solved correctly on the first contact. This is an important indication of customer satisfaction and the effectiveness of reps. When a rep is confident and knowledgeable, they're more likely to have higher FCR stats.

### Customer Satisfaction Scores

CSAT measures customer satisfaction with a company. Some customer service leaders note that the CSAT only captures a minority of customer insight, but it can still provide a broad picture of areas where customer service is excelling and where there are gaps.

### Net Promoter Score

NPS tracks the loyalty of customers based on how likely they are to recommend a product or service to someone else. While this may be subjective because it's based on the most recent interaction, it's a good way to identify areas for improvement on a rep and team level

### Service+Quality

This multifaceted KPI aims to capture more subjective elements of customer service including reliability, assurance, tangibles, empathy, and responsiveness. This metric can also highlight excellent customer service rep qualities and areas where they need to improve.

### Employee Churn

Also known as agent turnover, churn measures the percentage of reps and agents who leave the company. If teams experience a high level of churn, it may be time to review onboarding and training to improve employee engagement.

Teams that prioritize metrics like those listed above will have a healthy understanding of their customer's behaviors and their reps' performance. This will make it easier to highlight areas of success and discover where they need to concentrate efforts to improve individual and team service levels.

*"Many leaders become confused with the amount of data and metrics that they have at their disposal. The first step is to determine what the few most important metrics are and keep your eyes on them."*

— Bob Davis, Founder and CEO, Robert C. Davis and Associates

*"If you want your customer service representatives to be consulted, helpful, and really take their time to maximize the quality of the support, you can't do that while rushing people off the phone. It's impossible. But, if you take the time to focus on quality, the quantity and efficiency metrics take care of themselves."*

— Nate Brown, Co-founder, CX Accelerator

## Connecting the dots between customer service training and performance

While some teams simply update and track their KPIs, world-class teams take it a step further and tie customer service representative training directly to their **performance metrics and KPIs**.

To best determine how individual, team, and company performance is impacted by training, Lessonly's Services team recommends looking at KPIs across four different levels:

- Tier 1: These metrics focus on employee learning efforts and include items such as learner engagement, training satisfaction scores, and the percentage of employees who complete training.
- Tier 2: Once teams have an idea how their reps and agents rate training, it's beneficial to tie training to revenue. Look at metrics that can determine, or at least approximate, how much money is saved and earned as a result of training efforts.
- Tier 3: Now look at metrics that relate specifically to customer service skills. By reviewing efficiencies, key skills, and past successes, customer service leaders can determine what training is working—and where there are still gaps.
- Tier 4: Since training is about improving the bottom line, the fourth level of metrics should directly tie team training to business objectives for maximum impact.

Before implementing any customer service training program, it's also helpful to understand each metric's baseline. This will make it easier to identify if there's a change before and after training. Katrina Lallo recommends revisiting a topic or skill that impacts the specific KPI, then measuring both accuracy and overall productivity of reps to show a correlation between training and performance.

After choosing the best metrics and KPIs, it's just as important to communicate these measures to new and experienced reps. Better performance takes thoughtful employee enablement. Meaningful enablement ensures that reps know what's expected of them, how they'll be evaluated, and what they can do to improve.

*"Once you determine the metrics that really matter, the next step is to discover what behaviors drive those metrics. That's where the training, coaching and ongoing support toward those behaviors drive desired results."*

— Bob Davis, Founder and CEO, Robert C. Davis and Associates

*"I've seen contact centers throughout the world where the agents get out to the floor and they don't even really know what or why they're measured on particular KPIs, let alone really have a good understanding of how to improve and the training group should be the one starting those discussions."*

— Fred Stacey, GM, Cloud Center Search & Outsource Consultants

## Training that drives KPIs

Teams who **meaningfully leverage training** see higher CSAT scores, an increase in NPS, and a decrease in attrition rates. We asked our customers what training topics contribute to their improved KPI scores—here are a few of their favorites:

### Going above and beyond for the customer

Nothing helps explain the lengths that reps should go to for customers like first-hand stories. Crowdsourced stories from existing reps that detail times they went the extra mile to deliver excellent service. This makes the content more real and engaging for other team members.

### Why we want active promoters

NPS can be difficult to understand. Explain why it's important to track it and how it benefits the entire business.

### How to deal with an upset customer

The way reps handle situations with angry or upset customers makes the difference between redeeming the relationship—and earning a good CSAT—or losing their business. Take the time to train reps on what not to do to keep complaints from going from bad to worse.

### How to ask customers to take a survey

NPS lives and dies on the willingness of customers to take the survey. Train reps to guide customers through the surveys to ensure that NPS is correctly calculated.

## Restarting the cycle for continuous improvement

The beauty of using the Better Work Training Method is that it's all about continuous rapid improvement. Once your customer service team hits the Perform stage, it's time to review those metrics and begin the next Assess phase. High-performing teams continuously revisit their customer service training programs and gather data during the training process to see how they measure against their goals, time and time again.



## 7 Customer Service Training and Enablement for Enterprise

Many of the topics discussed in this guide apply to teams of all sizes. Online training, including practice in ongoing training initiatives, democratized learning, and on-demand content are all examples of ways **customer service enablement** can extend into the enterprise and scale learning. The need for these concepts becomes even more important in large organizations and becomes non-negotiable for success. While the tenets of the Better Work Training Method apply to any team, enterprise teams have unique challenges and opportunities as they pursue effective training.

*"Outsourced teams and BPOs will continue to be part of major corporations' contact center strategies. I don't see that changing. And the level of training that's required when you shift operations offshore is elevated. Doing business in multiple countries means multi-language support and 24/7 support, both of which are hard to provide from one time zone."*

— Brad Baumunk, President and COO at Robert C. Davis and Associates

*"One of the biggest challenges is to understand what should be trained versus coached, and what is the right methodology to deliver that. And one of the biggest challenges at many BPOs that I've worked with is trying to identify what content to offer after the initial training, as well as who should get what training."*

— Thomas Siebert, Consulting Director, TBS Inc. Consulting

# Training outsourced customer service teams

*Before we get started: If you're new to the contact center world, BPO stands for business process outsourcing, and is a common term referring to companies who provide contact center operations as a service.*

Outsourcing customer service is much more common in larger companies since they often have more complex customer service needs than a smaller company. As Brad mentioned, doing business in multiple countries means multi-language support and 24/7 support—both of which are hard to provide from one time zone. Oftentimes, offshore options are cheaper than doing it here in the United States. Training these teams comes with some challenges, and it's vital to instill the right culture and trust when working with an outsourced call center or customer support team.

*"It's all about finding a partner that shares your philosophy. From there, being able to gauge lesson feedback quickly from the outsourced reps is super important. The great thing about digitized training for offshore teams is they can create content quickly and can reach audiences of 1,000 or more people within minutes."*

— Amber Aslanian, Head of Customer Experience Operations, Earnin

*"Culture is extremely important. Try to get as close to a culture match with your outsourced partner, knowing it will never be perfect. Get the outsourced provider to understand how you operate. Not only what your brand voice is and what customer experience you want to provide your customers, but how does the customer care team need to operate?"*

— Neal Topf, President, Callzilla

Neal also provided some great questions to think about when considering a BPO partner:

- What familiarity do they have with your product or your industry?
- How easy or difficult would it be to train them?
- How willing and ready are they to be trained?
- Are they set in their ways or are they going to be willing to take instruction, direction, recommendations, and coaching to better improve how they perform on your behalf?
- How closely does their culture match yours?

Once initial training is done, the next challenge is figuring out how to manage continuous improvement in a BPO.

# How do problems change at scale?

Complex companies often have complex problems, especially for those with offshore customer service teams. These companies need to ensure that reps who are located across multiple locations receive consistent training, which is why intentional customer success enablement is essential.

## Specializing training

In smaller companies, it's easier to specialize training by role, team, and department. In large organizations or outsourced teams, more variables need to be considered such as training for different languages, supporting entirely different products, and delivering a consistent customer experience across the org.

## Democratizing learning

Bringing on creators from within the team goes further in the enterprise, where training needs are larger. Get as much help from top performers as possible, in order to keep training helpful, high-quality, and high-impact.

## Peer feedback

A culture of empowerment and sharing knowledge between reps raises the bar of performance across teams. Look for opportunities to foster a company culture of feedback and continuous improvement—that's how to keep a team agile in a large corporation.

## Empowering managers

Team managers in larger companies must take an active role in training. They must feel the responsibility for actually managing the training experience of their team, especially through regular coaching and feedback. A trainer can't possibly evaluate thousands of practice scenarios and lessons, that work must be shared with managers and experienced reps.

## Channel needs

New channels like chat, social, and self-service are more recent additions to the menu of options for serving customers. Utilizing new channels can be difficult to scale effectively, because of the complexity of support required. In order to drive adoption for new technologies, focus on enablement so teammates have the utmost clarity about how this new tool will impact their daily work—and the daily experience of customers.



## 8 Free Customer Service Training Materials

### Customer Service Policy Examples

Build guidelines and policies for customer service success.

[Download >](#)

### Customer Service Training Plan Builder

Develop a detailed training plan for your customer service team.

[Download >](#)

### Customer Service Training Manual Template

Achieve consistent and thorough customer service training for employees.

[Download >](#)

### Customer Service Training Calendar

Ensure training is consistent year round with these customer service training courses.

[Download >](#)

Now that you know what it takes to take your customer service training plan from good to great, it's time to get started. Check out some of Lessonly's customer service training materials that your team can use to learn, practice, and Do Better Work.

*P.S. Looking for more expert insights and tips? Check out these [customer service quotes!](#)*