

# FACILITATORS HANDBOOK

# CUSTOMER SERVICE TRAINING



**AMBASSADE  
DE FRANCE  
EN OUGANDA**

*Liberté  
Égalité  
Fraternité*



**UKARIMU**

# What is the purpose of this module?

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This training module serves as guidance to train young people in Uganda in customer service in the tourism & hospitality sector. The module is based on principles of Active Learning.

The training is developed for beginner level trainings but can also serve as a refresher course for people with some experience in tourism & hospitality.

The module can be used in a stand alone training, or combined with other Ukarimu modules that are all freely accessible at [www.ukarimuacademy.org](http://www.ukarimuacademy.org).

# What does this training module consist of?

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## THE MODULE CONSISTS OF:

- 1) Pages that guide the trainer on how to implement the different training activities.
- 2) Pages that will be displayed as a presentation during the training. These Pages can be edited as you like via PowerPoint or Google Slides.

## PREPARATIONS

### Training participants

This training is developed for anyone with an interest in customer service in the tourism & hospitality. Commitment to the training should be among the recruitment criteria. As this training is written in English, basic literacy and understanding of English are important (although it can also be translated into other languages).

### Trainers

The trainers are preferably tourism & hospitality professionals with particular interest in customer service and that have gone through a training of trainers (ToT). Ideally, the lead trainer is supported by a sidekick who helps in coordinating the training.

### Training venue

This training can be hosted at a range of training venues. To support active learning, choose a spacious venue where people can move around and work in small groups. Ideally your venue also has some outdoor space to host energizers and/or exercises.

### Training materials

- Flipcharts, sticky notes, writing equipment
- Projector and slides
- Various documents that go alongside this module
- Certificates of participation (to be developed by the trainer)



# TRAINING OUTLINE: DAY 1

## AGENDA



Introduction game,  
expectation setting, etc.



What is customer service?



Different people,  
different needs



Understanding what  
someone needs



Professionalism



Wrapping Up





## Introduction game (20 min)

### STEPS

1. Let the participants team up in pairs.
2. Give them 2x4 minutes to interview each other.
3. Let them find out each other's names and experience with working in tourism & hospitality. Invite all participants to share the answer to this question: "What is the kindest thing that someone ever did to you?"
4. Afterwards let participants introduce each other to the rest of the group by summarizing what their partner has shared.



### Learning goals

1. Participants will be more familiar with each other.



### ADDITIONAL MATERIALS

It is best to do this activity in a big open space. Take the group outside if possible.

*Reference Training content Customer Service Training, page: 2*



## Expectation setting (20 min)

### STEPS

1. Place the participants in an open circle, in front of a flipchart. Provide everyone with 3 sticky notes.
2. Let them reflect for 3 minutes on what they aim to learn during the training and what they can teach others.
3. Let them write down their learning goals on the sticky notes and invite them to place the sticky notes on the flipchart. (1 note = 1 learning goal)
4. Go through their answers and explain whether each expectation is realistic and reflect on what they can offer each other.
5. Emphasize that they should also take their own responsibility in ensuring that they actually learn what they have mentioned. Also emphasize that peer-to-peer learning can be very effective.
6. Also share your own expectations on the training and provide an overview of how the training will look like.



### Learning goals

1. Participants are clear on what they aim to learn and take ownership of their learning goals.
2. Participants realise what they can offer to others and are willing to help each other.





#### TIP FOR THE FACILITATOR:

when sharing the learning goals, start with one goal of a participant, read it out loud and ask other participants if they have the same or a similar goal. Harvest and cluster similar answers so you create an overview of different learning themes emerging from the group.

*Reference Training content Customer Service, page: 2*

## Deciding on rules (20 min)



### STEPS

1. Invite the participants to brainstorm on the rules for the training.
2. Let the participants split up in pairs and discuss with each other for 5 minutes what they consider to be proper rules on timekeeping, how to interact with each other, etc.
3. Ask each pair to mention one of the rules they have come up with. If the group agrees with the rule it will be written on a big sheet of paper. Allow people to come up with alternative suggestions.
4. Make sure people only suggest rules that cover new topics.
5. Also agree on what to do when someone doesn't respect the rule. Suggest something playful, such as singing a song or telling a joke.
6. When everyone (or at least the majority of the group) agrees with the rules, invite one person to sign the paper on behalf of the rest.
7. From now on the rules are in place!



### Learning goals

1. The participants agree on the rules of the training and feel ownership over them.

*Reference Training content Customer Service, page: 2*

## What is customer service? (90 min)



### STEPS

1. Introduce the topic of customer service with the help of the two reviews (to be found in the slides). Ask volunteers to read them out and to give their first response.
2. Write down the following questions, each on top of a different flipchart:
  - a. What is customer service?
  - b. Why is customer service important?
  - c. What does good customer service entail?
  - d. When do you provide customer service?
  - e. Which kinds of customer service do you already perform in your job?
3. Divide the group in 5 teams. Hand each group one of the flipcharts. Let them answer the question on the flipchart. Let them write down all things that come to mind.



4. After 10 minutes, rotate the groups so that the groups have to answer a different question. Let them add their ideas to what is already on the paper.
5. Repeat this process so that all groups get to see each paper.
6. Invite every group to give a short summary on what is on their last paper.
7. Close off with presenting the few slides about customer service.



### Learning goals

1. Participants get an understanding on what customer service is.



#### ADDITIONAL MATERIALS

Make sure to prepare these papers ahead of the exercise.

*Reference Training content Customer Service, page: 2 to 6*

## Different people, different needs (105 min)



### STEPS

1. Give a short introduction on how different people have different needs and wishes but that they all deserve great service. Use the slides for doing so.
2. Divide the participants into 5 groups and hand out the list of customers and actions. Also hand one of the customers + action list to each group. From each group, invite a volunteer to read out the customer introduction.
3. Let each group decide which actions mean good customer service for their customer.
4. Afterwards, go through each action and let each group put up their hands if they think the action means good service for their customer. Let them elaborate here and there. Also give your own opinion if relevant.



### Learning goals

1. Participants will learn that every customer has different needs and wishes. While they all deserve great service, it differs what that great service may entail.



#### ADDITIONAL MATERIALS

The customer introductions and action lists need to be printed ahead of the exercise.

*Reference Training content Customer Service, page: 7 to 9*



# Understanding what someone needs

(75 min)



## STEPS PART 1

1. Print and cut the list of types of customers, list of circumstances and list of jobs.
2. Do role plays in pairs wherein person A gets to pick one card with a type of customer and one card with a circumstance (both randomly) and person B only picks one card with a job randomly. Let them play out a role play wherein Person B needs to give good customer service to person A, by being attentive to the customer's needs, wishes and circumstances.
3. Play it out for about 2 minutes.
4. Let other participants reflect.



### Learning goals

1. Participants will learn to identify someone's wishes and how to act upon them.



#### ADDITIONAL MATERIALS

- List of types of customers
- List of circumstances
- List of jobs

All document needs to be printed out and cut into separate small papers, ahead of the exercise.

*Reference Training content Customer Service, page: 10*



# Professionalism (75 min)



## STEPS

1. Give everyone a copy of the Tips on Professionalism.
2. Let them all identify and write down 3 things they believe they already do well and 3 things they believe they can improve upon. Let them also come up with examples to illustrate this.
3. Ask a few people to elaborate.
4. Afterwards, invite participants to ask any questions regarding professionalism they may have. After each question, let them first try to answer their question themselves, followed by their fellow participants and close off by adding whatever still needs to be addressed.



## Learning goals

1. Participants will learn more about professionalism and how they can become more professional themselves.



### ADDITIONAL MATERIALS

- Tips on Professionalism

This document needs to be printed so that all participants get a copy.

Reference Training content Customer Service, page: 10





## Wrapping up (30 min)



### STEPS

1. Hand out three sticky notes in different colors to each participant.
2. Let them write down on one sticky note with a specific color what they appreciated about the day.
3. Let them write down one thing they learned today on another sticky note.
4. Let them write down one thing that could be improved in the training at the last sticky note.
5. Ask them to place the sticky notes on a flipchart, grouped per color.
6. Invite everyone to walk up to the flipcharts and read the sticky notes.
7. Harvest a few answers in the plenary, 1-3 for each flipchart.



### Learning goals

1. The participants learn to reflect on the training and their own learning process.



### ADDITIONAL MATERIALS

None

*Reference Training content Customer Service, page: 11*

## TRAINING OUTLINE: DAY 2

### AGENDA



Making a good first impression



Dealing with disappointed guests



Preventing & solving problems



Preventing sexual harassment



Decent work and safety



Contracts and job descriptions



Wrapping Up



# Making a good first impression

## (60 min)



### STEPS

1. Let the participants split up in pairs and let them come up with a list of 5 most important tips to make a good first impression on clients.
2. After 10 minutes, invite all groups to share what they have come up with. Whenever a tip is brought up, invite every group that has listed the same tip to raise their hands. Write down the number next to the tip - as these numbers indicate how important these tips are.
3. After all items have been brought up, make a list of +/- 10 tips that have been rated most important.
4. Depending on how much time there is left, organize a role play in which each participant has to apply these 10 tips.



### Learning goals

1. The participants learn how to make a good first impression.



### ADDITIONAL MATERIALS

None

# Dealing with disappointed guests

## (90 min)



### STEPS

1. Introduce the topic of dealing with disappointed guests by explaining what is on the following slide.
2. Go through the 6 steps that generally help to satisfy disappointed guests.
3. Organize a role play in which groups of 3 have to play out a scenario in front of the group.
4. Person 1 and 2 will pick 2 cards randomly, 1 for who the clients are, and 1 for why they are disappointed. They will act as if they are those clients and are disappointed because of that reason.
5. Person 3 will represent a tourism company that is trying to deal with the disappointed clients. He/she will have to apply all the 6 steps as mentioned before.
6. The play will continue for a minute or 3. The audience will give constructive feedback on whether the situation was handled correctly.
7. After all participants have done the roleplay, close of the exercise by asking a few people what they learned.



### Learning goals

1. Participants will learn how to deal with disappointed guests.





#### ADDITIONAL MATERIALS

The roleplay cards need to be printed ahead of the exercise.

*Reference Training content Customer Service, page: 11 to 12*

## Preventing & solving problems (60 min)



### STEPS

1. Ask participants to discuss in pairs why preventing a problem is better than curing a problem. Invite a few participants explain.
2. Use the scenarios from the slides and let participants in pairs come up with ways how they could have been prevented altogether. Let each pair present it to each other and let them receive feedback.
3. Afterwards, let volunteers come up with their own scenarios based on their own experiences. Let them introduce their scenario.
4. Ask them how they dealt with the situation and how they believe they should have handled the situation. After that, ask the group to give feedback. After that you as trainers can express your thoughts.
5. Ask a few participants to share what they learned from this exercise.



### Learning goals

1. Participants learn how to solve problems and how to prevent them.

*Reference Training content Customer Service, page: 12 to 13*

## Decent work and safety (90 min)



### STEPS

1. Begin this session by saying that we are going to talk about decent work. Then ask,
  - a. “What does the term decent work mean?”
  - b. Ask a few people, “If you were to give marks, out of 100, to what extent is your job decent?” “Why?”
2. Then the facilitator will present the elements of decent work using the slides and ask the participants to re-assess how decent their job is after seeing the elements shared?



3. Slides on safety and sexual harassment will also be presented here.
4. As a close to the presentation, participants can be asked on how they intend to professionally push their employers to offer them decent jobs.



### Learning goals

1. Participants will learn about and appreciate decent work. Facilitator to ensure that participants understand their rights VS their responsibilities, so that there is a knowledge balance



#### ADDITIONAL MATERIALS

Flipchart and markers

*Reference Training content Customer Service, page: 13 to 14*

## Contracts & Job Descriptions (75 min)



### CONTRACTS

1. “Let’s zoom into contracts. What is a contract? Of what importance is a contract? How many of us have a contract?”
2. Show the group an example of a customer service contract, and see if they recognize the decent work elements therein. Which ones do they see?

### JOB DESCRIPTIONS

1. Give a short introduction into job descriptions.
2. Invite participants to collectively develop a customer service job description. List the contributions on a flip chart.



### Learning goals

1. Participants will become more familiar with contracts and job descriptions.



#### ADDITIONAL MATERIALS

Bring a few contracts and job descriptions that can serve as example.

*Reference Training content Customer Service, page: 15 to 16*



## Wrapping up (30 min)



### STEPS

1. Hand out three sticky notes in different colours to each participant.
2. Let them write down on one sticky note with a specific colour what they appreciated about the day.
3. Let them write down one thing they learned today on another sticky note.
4. Let them write down one thing that could be improved in the training at the last sticky note.
5. Ask them to place the sticky notes on a flipchart, grouped per colour.
6. Invite everyone to walk up to the flipcharts and read the sticky notes.
7. Harvest a few answers in the plenary, 1-3 for each flipchart.



### Learning goals

1. The participants learn to reflect on the training and their own learning process.



### ADDITIONAL MATERIALS

None

*Reference Training content Customer Service, page: 16*



# TRAINING OUTLINE: DAY 3

## AGENDA



Sales



Environmental sustainability  
and green jobs



Assessment



Graduation & closure



## Sales (150 min)



### STEPS

1. Provide each participant a copy of the sales tips. Let participants read them out loud and make sure they get the point.
2. Let the participants split up in groups of 3. Let each group pick a fictional or real tourism product that they want to sell to clients, such as a luxurious room, a cultural tour or a boat safari.
3. Let them come up with a specific kind of interested customer, such as a honeymoon couple, a student or an elderly person. Let them do role plays amongst each other on how they can sell the product to the client. Person A will try to sell the product to Person B and C who will act as customers.
4. Make sure they rotate roles and give each other tips on how they could improve their sales strategy.
5. After +/- 60 minutes, invite all groups for a collective demonstration of roleplays. During these sessions the customers will consist of participants from other groups.
6. After each roleplay invite the sales person to reflect on how it went, and harvest lessons on how to improve the sales strategy.



### Learning goals

1. Participants will learn how to sell products to clients.



### ADDITIONAL MATERIALS

Sales tips, printed in advance

*Reference Training content Customer Service, page: 17*

## Environmental sustainability and Green jobs (105 min)



### STEPS

1. Introduce the topic of environmental sustainability and ask openly, “What is environmental sustainability?”
2. In groups, ask participants to discuss the following questions in relation to their work environment and present to the group.
  - a. How can we save energy/power? How can we communicate it to our guests?
  - b. How can we save water? How can we communicate it to our guests?
  - c. How can we practically protect our environment in terms of air quality, soil, vegetation etc.? How can we communicate it to our guests?
  - d. What are the bottlenecks to environmental sustainability in the tourism and hospitality sector?



3. Once the groups have shared, the facilitator presents the sustainability and green jobs criteria as a round up of the session and participants can share if and how they practice the elements of the criteria.
4. Participants can also select elements that they will commit to or lobby for and practice when they go back to their place of work.



### Learning goals

1. The participants learn about environmental sustainability and get inspiration to push the sustainability agenda at their workplace.



#### ADDITIONAL MATERIALS

Markers and flipcharts

*Reference Training content Customer Service, page: 18*

## Assessment (165 min)



### STEPS

1. Divide the participants into 4 teams.
2. Each team will receive the same list of 5 assignments, listed on the next page.
3. They will get 30 minutes to prepare all of them. They have to complete all the assignments.
4. After that, they will present their assignments to a jury (consisting of facilitators and available experts).
5. After each assignment the jury will rank the teams according to who performed best.
6. After all assignments have been presented, the team with the highest overall score wins a prize!



### Learning goals

1. The participants will demonstrate what they learned.



#### ADDITIONAL MATERIALS

Make sure to have arranged a jury panel and a prize (such as ice cream or candy) beforehand.

*Reference Training content Customer Service, page: 19*





# Closure & graduation (30 min)



## STEPS

1. Encourage the participants to think on what they will do with their learning. Will they teach others? Will they come up with a new sales strategy? Will they make sure that all disappointed clients will have been dealt with professionally? Let them come up with a plan that has tangible goals.
2. Invite all participants to have some closing remarks in which they elaborate on what they learned and on their next steps.
3. Hand out certificates and have fun.



## Learning goals

1. Participants will have thought about the next steps after the training and have enjoyed the closure of the training.



## ADDITIONAL MATERIALS

Certificates of participation, to be developed before the training.



## THIS MODULE IS DEVELOPED BY...

### Lead partner



Ukarimu is an initiative that develops open-source training material for the tourism & hospitality industry.

[www.ukarimuacademy.org](http://www.ukarimuacademy.org)

### Funding partner



### Implementing partners

