

Facilitating a Customer Service Workshop

Plan, run, and debrief service-skills workshops

- ✓ - Design, delivery, and follow-up covered
- ✓ - For customer-service managers, trainers, and facilitators
- ✓ - Leave ready to facilitate practical sessions
- ✓ - Focus on lasting behavior change



Why Facilitation Beats Lecturing

LECTURING



FACILITATING



- Presenting informs; training demonstrates; facilitating uncovers



- Adults learn best through active participation and discovery



- Common mistakes: over-talking, ignoring group dynamics, no practice time

The Facilitator's Core Mindset

- - Act as neutral guide, timekeeper, and group coach
- - Blend content expertise with participant discovery
- - Foster psychological safety and manage authority wisely



Reading the Customer-Service Environment



- Map frequent service scenarios and pain points



- Align content with service standards and brand values



- Define observable behaviors for service interactions

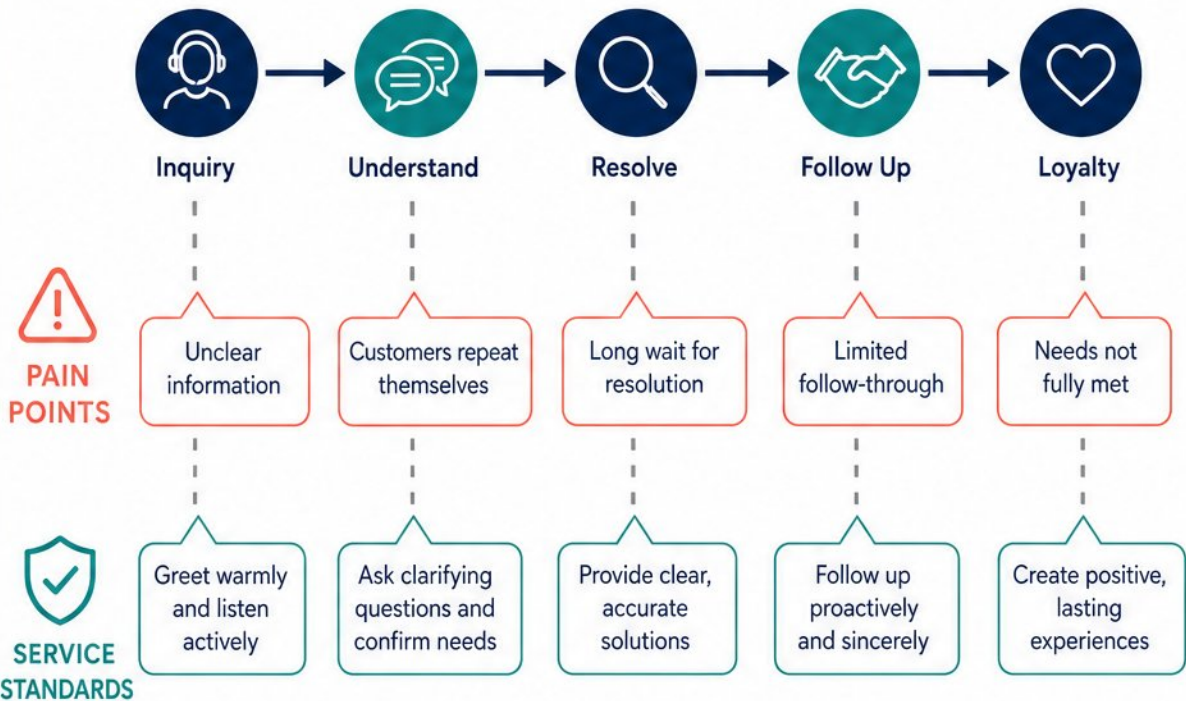


- Set measurable improvements linked to customer feedback



- Use data to target what matters most for service teams

SERVICE JOURNEY MAP



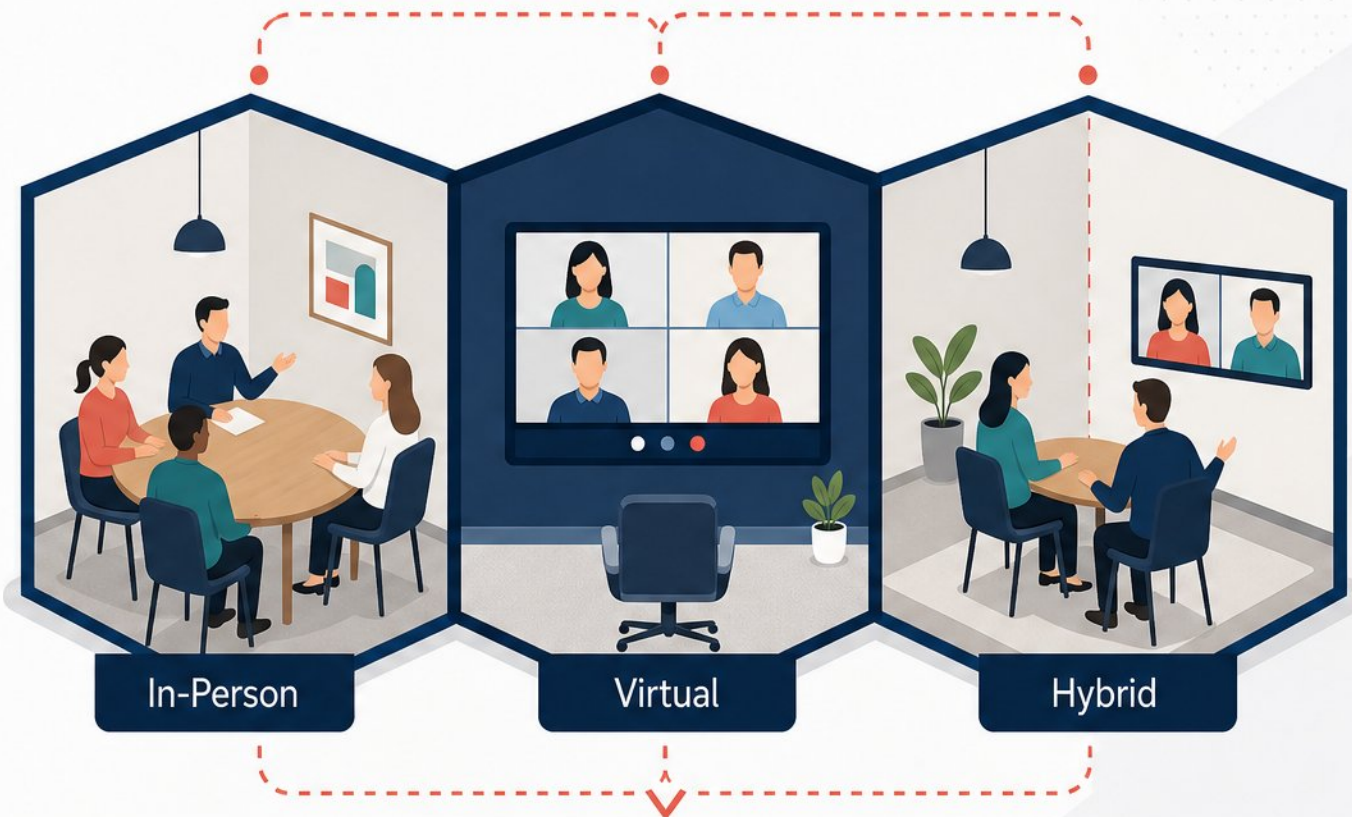
Pain points indicate where customers experience friction or frustration.



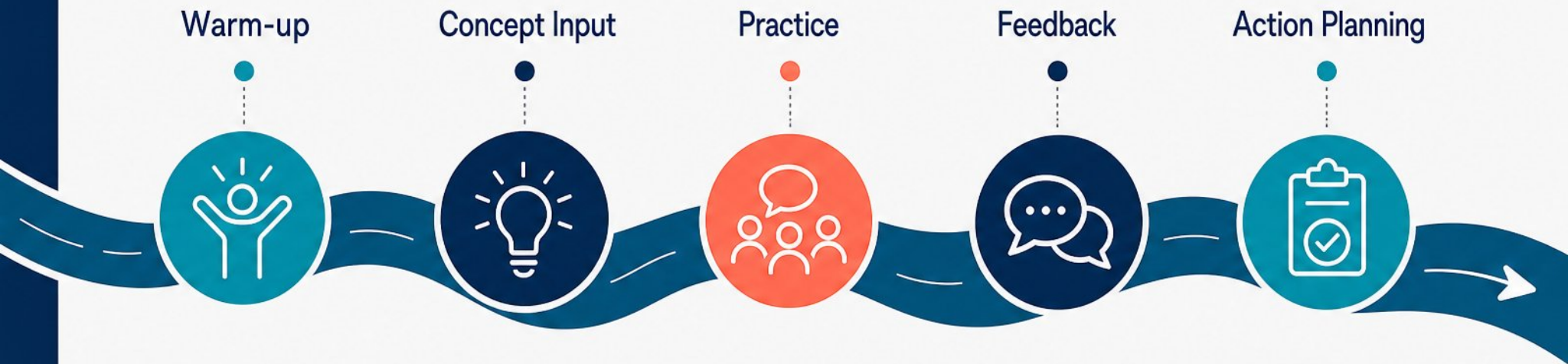
Service standards define the behaviors we expect at every touchpoint.

Setting Objectives and Success Criteria

- ✓ Write clear, measurable learning objectives for short sessions
- ✓ Define success criteria tied to real service outcomes
- ✓ Choose between in-person, virtual, or hybrid delivery
- ✓ Align goals with service standards and brand values
- ✓ Ensure objectives are observable and achievable



Sequencing a Workshop That Flows



- - Warm-up, concept input, practice, feedback, action planning
- - Time transitions, adjust energy, keep momentum
- - Adapt sequence for time constraints or low engagement

Core Dialogue and Engagement Techniques



- Use open questions, active listening, and paraphrasing
- Balance talk time and involve quiet participants
- Redirect dominant voices with respectful structure
- Manage energy with transitions and timed pauses

Running Customer-Service Scenarios



- Use role-plays, case studies, and real transcripts



- Guide practice with clear scenario context and goals



- Give feedback that is specific, timely, and behavior-focused



- Turn errors into learning moments, not blame



- Debrief with group insights and key takeaways



Handling Resistance and Disengagement



Identify sources of skepticism and low engagement



Respond calmly to conflict or disagreement



Redirect negativity toward constructive dialogue



Recover quickly when activities fail or timing slips



Maintain group trust through transparency and flexibility



Measuring Workshop Impact



- Define success metrics before the workshop begins



- Collect participant feedback and use structured observation



- Run post-workshop checks to track behavior change



- Link outcomes to customer-service KPIs

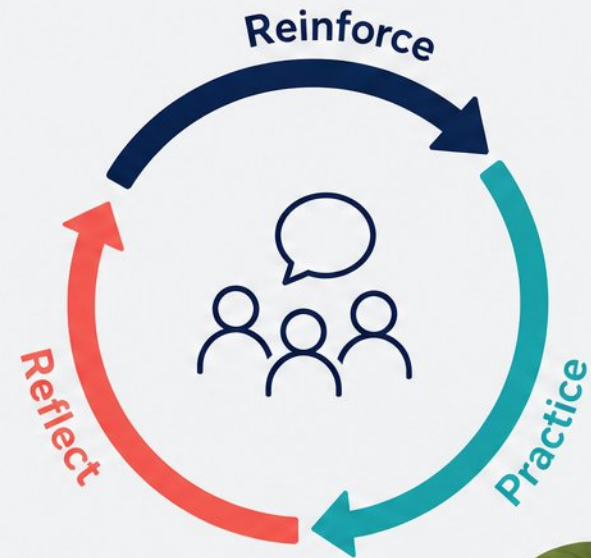


- Use follow-up surveys, manager reports, and service data



From Workshop to Workplace

- Action planning and manager reinforcement after the workshop
- Creating job aids, checklists, and coaching routines
- Sustaining new service behaviors over time



Facilitation Practice Lab

- Lead a short customer-service scenario practice
- Give and receive structured, behavior-specific feedback
- Turn practice slips into learning moments
- Identify personal strengths and growth areas
- Plan next steps for future facilitation

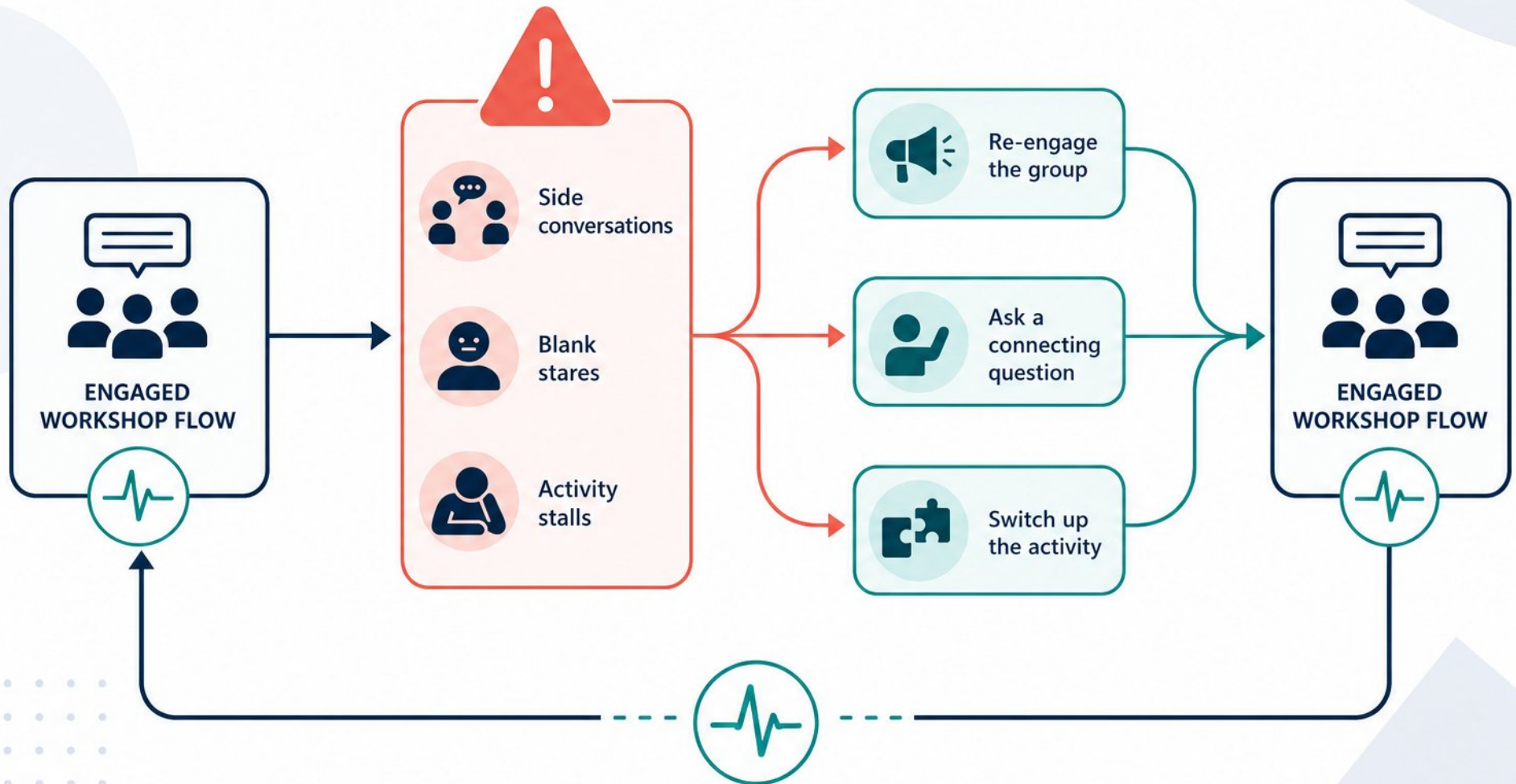




Common Pitfalls and Rapid Recovery



- Watch for side conversations, blank stares, or activity stalls



Action Plan for Your Next Workshop



- Choose a real service workshop to design or improve



- Apply facilitation techniques from this course



- Set follow-up steps and behavior-change metrics



- Schedule manager reinforcement and coaching check-ins



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