



London Museum Development Volunteer Training Bank: **Customer Care Training Plan**

This plan was written by Lynne Gillett (lgconsultancy@yahoo.co.uk) on behalf of the London Museum Development Team. Lynne is a freelance trainer, consultant and writer specialising in volunteer management issues. Lynne has produced the 'Customer Care Training Plan' to be used in conjunction with the 'Customer Care Presentation,' 'Customer Care Exercises,' and the 'Customer Care Handouts' available on the London Museum Development Team's Volunteer Training Bank (www.museumoflondon.org.uk/supporting-london-museums/resources/training-bank).

For more information on how to use these resources to support you to train your volunteers, please read the 'How to use the Training Bank' and the 'Train the Trainer Guide' documents available here: www.museumoflondon.org.uk/supporting-london-museums/resources/training-bank

This is a half-day course that can be tailored to represent a specific gallery or museum's volunteer roles and issues in customer care. The 'Customer Care Training Plan' provides a suggested agenda, along with a more detailed plan with trainer notes for staff to use to deliver the session to volunteers.

As a half-day course taking about 3 ½ hours, this is an overview, highlighting areas that some volunteers may not feel confident about. We found that many did not have a previous employment background in this area, but it's also an opportunity to reassure them about their existing good practice.

This course could also be converted into a full day, using the afternoon to go into a particular aspect (eg specific access needs, diversity, sales techniques) in more detail, or putting issues raised in the morning session into practice in the museum itself.



The course starts by asking volunteers to think about their own experiences of receiving customer care in their everyday lives, and then moves on to help them consider how they can improve their own volunteer role in customer care in their museum's context. Tailored to their interests, previous experience and training, particular customer needs are highlighted, such as working with groups, providing support and facilities for disabled, younger or second-language/overseas visitors, and what good customer care in a museum shop or cafe requires. Volunteers are given an opportunity to share their ideas and concerns in small group work.

Often acting as the "face" of the museum, the course also encourages the volunteers to feed through to staff what they are hearing from visitors, helping their museums to implement small changes or highlight visitors' changing needs. Finally, there was the opportunity to problem-solve as a group, looking at examples of some of the more difficult issues that can arise, and how to deal effectively and confidently with complaints.

By the end of the course, participants should have an understanding of:

- What good customer service is
- The role volunteers play in customer care for their museums
- How volunteers deliver good customer service for their museum
- How to develop their communication skills
- How to identify communication issues for specific volunteer roles
- Customer care for specific visitor's needs
- How to deal with complaints



Suggested Agenda

Time	Activity
10.00am	Arrival
10.30am	Introductions
10.45am	What is good Customer Care?
10.55am	Why do people go to museums and galleries?
11.15am	What is the role of volunteers in customer care for their museum?
11.20am	How do volunteers then deliver good customer care for their museum?
11.25am	Communication Skills
11.35am	Communication Issues for specific volunteer roles
11.45am	Break
11.55am	Customer Care for specific visitor needs
12.25pm	Case Studies exercise
12.55pm	Dealing with complaints
1.20pm	Conclusion and Evaluation
1.30pm	End



Training Plan with trainer notes

Activity & Corresponding PowerPoint Presentation Slide	Training Notes	Additional Comments for Trainer	Time needed
Introduction (PowerPoint slide 1)	<ul style="list-style-type: none"> • Introduce self • Cover housekeeping items, e.g. fire alarm / evacuation, breaks, mobile phones • Explain the purpose of the training / aims of the course • Participants to introduce themselves • Participants to state what they hope to get out of the session • Each person to write two things on a post-it note and stick on wall 	<p><i>Make sure participants know what to expect from the training and that, although the training is participative, it is a safe environment.</i></p> <p>Keep this brief and to the point.</p>	15 mins



<p>What is good Customer Care?</p> <p>(PowerPoint slide 2)</p>	<ul style="list-style-type: none"> • Brainstorm, asking group to shout out bad examples of Customer Care – use the example of going into a clothes shop, and if this begins to flag, of cold-callers by phone. • Then move on to what are elements of Good Customer care, again asking them to call these out and writing them up on board/flip-chart. Looking to bring out: <ul style="list-style-type: none"> ○ Body language (smile, folded arms, sitting, standing etc.) ○ Personal interest - treating everyone as an individual (or the only person in the world!) ○ Noticing specific needs ○ Friendly / Approachable style ○ Balancing opening conversation/ not being intrusive ○ Guessing what they may be attracted to ○ Attention on customer, not other distractions ○ Knowledge of products/displays/history/local area 	<p><i>Use this as both a fun learning exercise, and as an icebreaker which establishes agreed basics of Good Customer Care.</i></p>	<p>10 mins</p>
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<p>Why do people go to museums and galleries?</p> <p>(PowerPoint slides 3-4)</p>	<ul style="list-style-type: none"> • Challenge the group to think of as many reasons as possible – can they beat 20 reasons? • Put them in pairs to try to think of 10 per pair, give them 5 mins to write as many as possible down together then go round each pair as fast as possible, each pair giving an answer that hasn't yet been given. • Trainer writes these up on flip-chart/board until ideas are exhausted. • Ideas that have come through have included: <ul style="list-style-type: none"> ○ To learn something new ○ To re-visit favourite things ○ Nostalgia ○ See a special exhibition ○ See one item ○ Do course-work ○ Research ○ Find Inspiration (eg own creative projects) ○ Find peace / escape busy life ○ Going on a date ○ Trying to impress other people ○ Brought by others – school, relatives (willingly or not?!) <ul style="list-style-type: none"> ○ To buy a present ○ For Fun 	<p><i>Gets the group to think about all the different kinds of expectations visitors have, and how different customers want different kinds of interaction.</i></p> <p><i>Also reinforces to the volunteers how well they understand the visitors.</i></p>	<p>25 mins</p>
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	<ul style="list-style-type: none">○ Coffee shop/lunch○ To fill in time before another appointment○ To use the toilets○ Meeting place / near another attraction○ To share their experiences with friends, family○ To review it for a guidebook○ To assess it for funding● Highlight some of these with examples and comments		
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<p>What is the role of volunteers in customer care for their museum?</p> <p>(PowerPoint slide 5)</p>	<ul style="list-style-type: none"> • Talk about how important volunteers are in being the “face” of the museum: <ul style="list-style-type: none"> ○ Making visitors welcome ○ Directing visitors to facilities ○ Reflecting visitors’ diversity ○ Sharing enthusiasm / knowledge ○ Providing cover ○ Feeding back visitor’s experiences for planning ○ Ensuring visitor’s safety and comfort 	<p><i>Make volunteers consider how important their role is and how it fits in with the museum’s needs</i></p>	<p>5 mins</p>
<p>How do volunteers then deliver good customer care for their museum?</p> <p>(PowerPoint slide 6)</p>	<ul style="list-style-type: none"> • Treating everyone as an individual. The “mother principle”! • Friendly / Approachable -body language • Opening conversations without being intrusive – using open/closed questions • Introducing yourself • Listening • Sharing your enthusiasm and knowledge • Focusing attention on the visitor not other volunteers/distractions 	<p><i>Reinforces the previous thinking about general principles of good customer care but puts the focus on what the museum needs from them.</i></p> <p><i>Volunteers tend to join in and comment during this outline as their thoughts around this are developing, sharing their specific experiences which creates peer learning within the group.</i></p>	<p>5 mins</p>



<p>Communication Skills</p> <p>(PowerPoint slide 7)</p>	<ul style="list-style-type: none"> • Un-pick specific elements of communication for good customer care. Give examples and invite their ideas on particular issues around: <ul style="list-style-type: none"> ○ Body language (include presentation, stance, facial expression, voice, gestures, placement in room, proximity, eye contact) – this can be prompted by actually taking up some of these roles! ○ Using open/closed questions to invite more interaction or to stop someone monopolising you ○ What body-language shows someone is friendly and approachable? ○ What body language shows someone is not friendly and approachable? ○ What is different when giving customer service by phone? (eg neither can use body language but any impatience in voice is magnified, putting people on hold, creating effective answering machine messages, making sure you have all the information and repeat it to the caller) 	<p><i>Many volunteers will not have thought about these issues as specific techniques that can be learnt and implemented.</i></p> <p><i>At the end of the activity give out Handout 1: Example of a Customer Care Charter.</i></p>	<p>10 mins</p>
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<p>Communication Issues for Specific Volunteer roles</p> <p>(PowerPoint slide 7)</p>	<p>Phone issues:</p> <ul style="list-style-type: none"> • Callers don't know the situation at your end • If calling someone back introduce yourself and ask if it is a convenient time • Make notes • Use the person's name • Close by asking if you can help them with anything else <p>Shop issues:</p> <ul style="list-style-type: none"> • If the shop/cafe is quiet, take time to talk • If the shop/cafe is busy, also try to make each exchange feel personal - perhaps prepare some quick but "closed" things to say • Make sure prices are clearly displayed, and if possible highlight cheaper as well as luxury items • Know your merchandise – have you tasted the food? • Personal recommendations are always stronger. • Note any comments to feed back into choosing future menus/merchandise for the museum • Allow people to browse without interruption – follow their body language – but if they are going to walk out without purchasing, try to get their 	<p><i>Play by ear which of these to include and how long to spend on this according to group make-up (using initial questionnaire on participants' roles and interests or a show of hands).</i></p> <p><i>At the end of the activity give out Handout 2: Customer Care Issues – Specific Volunteer Roles.</i></p>	<p>5-15 mins</p>
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	<p>interest with an “opener” question</p> <ul style="list-style-type: none"> • Sales are best made by making people feel you are paying them special attention • Do thank them after each purchase <p>Groups</p> <ul style="list-style-type: none"> • Try not to let one member of a group monopolise you – if possible involve everyone in some way • Try not to “herd” people – try to engage them as a collection of individuals • If you are worried about the safety of objects because of space/the size of the group, do explain what these issues are at the beginning and remind everyone as a whole group rather than singling someone out if there is a problem • Keep an eye out for individual needs but try not to divert the whole groups’ attention towards someone if there is a specific support issue • If possible, try to split the group if there is going to be a rush for a shop/cafe at the end – perhaps direct them to these at the same time as pointing out the garden access/toilets/visitors book etc. 		
Coffee break	Trainer collates the slips volunteers filled in on preferences for the case study and decides on how to	<i>Many volunteers particularly welcomed the opportunity to network if they didn't</i>	10 mins



(PowerPoint slide 8)	group them in twos/threes.	<i>know each other well already.</i>	
<p>Customer Care for specific visitor needs</p> <p>(PowerPoint slide 9)</p>	<ul style="list-style-type: none"> • Agree/Decide which of the areas below to cover in what detail • Make it clear that these are just overviews and point volunteers towards handouts, other resources (eg toolkits on MLA website), further training they could attend. A chance for people to discuss as a group issues they have encountered • Run through key points inviting questions and comments from whole group. <p>Younger visitors:</p> <ul style="list-style-type: none"> • Getting an accompanying adult/teacher on-side beforehand making clear any potential issues • Tackle assumptions that younger people have limited knowledge – generally most appreciate being treated as adults • If some behave inappropriately, avoid singling out unless absolutely necessary, and help them understand what is good museum etiquette and why • Not all young people will be keen to be there – are 	<p><i>Discussions encouraging peer learning, volunteers raise specific issues they are unsure about.</i></p> <p><i>Play by ear which of these to include and how long to spend on this according to group make-up (using a pre-questionnaire or show of hands)</i></p> <p><i>20 mins should allow either a rush through all key points without questions, or dealing with around 2 of these areas in a little more detail.</i></p> <p><i>At the end of the activity give out Handout 3: Ethnic Diversity in Museum Customer Care.</i></p>	20-30 mins



	<p>there any other (safe!) activities that they could enjoy whilst adults in their group look around? Giving them a simple responsibility (e.g. asking them to be your assistant) can keep them happy</p> <p>Disabled Visitors:</p> <ul style="list-style-type: none">• Ask what provisions the museum makes for disabled people. Often volunteers only identify ramps –so highlight what a small percentage of disabled people have mobility issues that need these (ie under 10%).• Gives the chance for a group discussion/brainstorm about other access issues eg dyslexia, sight and hearing impairment etc.• Disabled people are the experts on their own needs:<ul style="list-style-type: none">○ They will tell you what you need to do to help○ Ask them and listen to what they say○ Treat the person with the same respect you would give anyone else○ Treat disabled adults as adults○ Avoid making assumptions; and take your lead from the disabled person.		
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	<p>Overseas/Second-Language/Ethnic Minority Visitors:</p> <ul style="list-style-type: none">• Sensitivity towards social/historical/race issues that may be raised by displays and descriptions of items• Different views of any historical or cultural event. Hearing other views can enrich the collection and future visitors' experiences, so do invite other perspectives, and feed back to other museum staff• Don't make assumptions about visitors interests. Be cautious of pointing someone towards an item you feel they would have a connection with based on their ethnicity• English as a second language: helpful to slow down speech slightly, but not increase volume! Try to simplify the construction of sentences a little as well as avoiding jargon / slang• Many different etiquettes around the world. Take the lead from observing the visitor's own body language, and respect their physical space• Some visitors may not understand the unspoken "etiquette" of museums in the UK– rather than saying what visitors mustn't do, guidance may be appreciated		
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<p>Exercise</p> <p>(PowerPoint slide 10)</p>	<ul style="list-style-type: none"> • Organise the volunteers into groups of 2-3 according to their preferences collected before the course • Hand out the relevant case study sheets • Explain that there may be several solutions to each, and there is no single “right” answer • Give them 10-15 minutes to work in their groups on the case study, noting down ideas • Each group then feeds back to the whole groups & other suggestions are invited. 	<p><i>Small group work to look at specific interests or concerns volunteers have, develop problem-solving and practice their presentation skills.</i></p> <p><i>At the start of the activity give out Exercise 1: Specific Customer Care Issues.</i></p>	<p>30 mins</p>
<p>Dealing with Complaints</p> <p>(PowerPoint slides 11-12)</p>	<ul style="list-style-type: none"> • Run through the basic process and key areas of dealing with complaints (see handout) • Highlight the importance of welcoming complaints, understanding these are not personal, and how these give the museum information for improvements. 	<p><i>Some volunteers may not have a background in work that included handling complaints, and many feel strong ownership of their museums, so can struggle not to take complaints from visitors personally.</i></p> <p><i>This aims to give them reassurance and the basic tools to act professionally.</i></p> <p><i>At the end of the activity give out</i></p>	<p>25 mins</p>



		Handout 4: Dealing with Complaints.	
Conclusion (PowerPoint slide 13-14)	<ul style="list-style-type: none">• Ask group if they have any further questions• Let them know of the further support available to them from the London Museum Development Team (website, contacts and training)	<i>Collect evaluation/feedback from participants.</i>	10 mins