

Public Service Guide Foundations



National Contact Center New Hire Challenge Training

OTED Training

Public Service Guide Foundations Lesson Plan

Instructor Preparation

Visual:

This lesson is accompanied by a PowerPoint presentation.

Instructor Preparation:

- Be able to access all references.
- Post PowerPoint presentation in the online training platform used.
- Ensure that platform has sufficient capacity for all trainees.
- If training is conducted in person, ensure that the room has the necessary projector and audio guidelines

Materials accompanying this lesson include:

- PowerPoint Presentation
- Participant Guide Handout

Lesson Plan

Duration: 2 hours

Audience: This lesson is intended for New Hire Public Contact Representatives (PCRs) within VBA's National Call Centers (NCCs) however, it is also suitable for any new or experienced VA employee desiring information on this subject.

Purpose: This lesson provides VA employees assisting the public with an opportunity to enhance their knowledge on this topic. It fulfills the training requirement outlined in the Standard Operating Procedures (SOP) for new hires in the National Training Curriculum (NTC).

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Objectives: Review the lesson objectives and assure students they will have opportunities to practice what they learn. Upon completion, trainees will be able to:

- Recall VBA's mission and vision statement
- Recall VA I CARE Values
- Provide the difference between Standard Business Customer Service and VA Customer Service.
- Identify six (6) strategies of customer service.
- Identify the four (4) modules of the Public Service Guide.
- Understand the importance of listening skills
- Define Emotional Intelligence

slide 3

References

Intranet

- [I CARE Program](#)

Internet

- [VA Mission Statement](#)
- [VA Core Values & Characteristics](#)
- [I CARE Videos](#)
- [I CARE Tools and Resources](#)
- [I CARE Recognition](#)
- [VBA Mission Statement, Vision, & Strategic Goals](#)

Lesson Content

slide 4

Introduction

As a Public Contact Representative (PCR), your interactions should exemplify VA's core values and core characteristics. VA's core values provide a baseline for the standards of behavior expected of all VA employees (ICARE). VA's core characteristics are a common set of principles around actions that describe the traits that all VA organizations should possess and demonstrate (Trustworthy, Accessible, Quality, Innovative, Agile, and Integrated).

slide 5

VA's Mission Statement

VA's mission statement is: "To care for those who have served in our nation's military and for their families, caregivers, and survivors."

Those words from Lincoln's second Inaugural Address reflect the philosophy that guides VA in everything we do as we serve our nation's Veterans and their families.

As a Public Contact Representative (PCR), you will take calls from Veterans, their family members, and other interested parties regarding the full array of benefits available through the Department of Veterans Affairs (VA). VA's mission and core values are the foundation for our duty to serve all our customers with respect and honor. Our Veterans have served our country. Now it's our turn to serve them.

The Department of Veterans Affairs (VA) is unlike the standard client/business relationship. In a standard client/business relationship, the client pays for a service provided by a business. VA's client/business relationship is different, due to the fact, that benefits, and services provided by VA have been earned by service to our country-whether by the Veteran or a member of the beneficiaries' family. In

addition, VA clients do not have the option to contact a competitor if they do not like the customer service they are provided.

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VA Mission

The Department of Veterans Affairs (VA) Mission, vision, and core values statements are built around:

- Respecting the duty of serving Veterans, beneficiaries, and their families.
- Honoring Veterans who have earned benefits for themselves and their families by serving our country.

slide 7

VA Vision

VA's vision is "To fulfill our Nation's promise to those who serve by delivering the benefits and service they have earned to enable full, independent, and productive lives."

slide 8

- **I stands for Integrity**
- **C stands for Commitment**
- **A stands for Advocacy**
- **R stands for Respect**
- **E stands for Excellence**

slide 9

VA I CARE Values

No organization can succeed without values to match its mission. Our core values focus our minds on our mission of caring and thereby guide our actions toward service to others

These define our culture and strengthen our dedication to those we serve. They provide a baseline for the standards of behavior expected of all VA employees. They remind us and others that "I CARE":

I care about those who have served.

I care about my fellow VA employees.

I care about choosing "the harder right instead of the easier wrong."

I care about performing my duties to the very best of my abilities

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Public Service Guide Foundations Lesson Plan

Our core values focus our minds on our mission of caring and thereby guide our actions daily toward service to others. These values apply to all VA employees, from the hospitals to the regional offices, from the cemeteries to the call centers, from Central Office in Washington, D. C. to your location.

Because **I CARE**, I will...

| | |
|-------------------|--|
| Integrity | Act with high moral principle. Adhere to the highest professional standards. Maintain the trust and confidence of all with whom I engage. |
| Commitment | Work diligently to serve Veterans and other beneficiaries. Be driven by an earnest belief in VA's mission. Fulfill my individual responsibilities and organizational responsibilities. |
| Advocacy | Be truly Veteran-centric by identifying, fully considering, and appropriately advancing the interests of Veterans and other beneficiaries. |
| Respect | Treat all those I serve and with whom I work with dignity and respect. Show respect to earn it. |
| Excellence | Strive for the highest quality and continuous improvement. Be thoughtful and decisive in leadership, accountable for my actions, willing to admit mistakes, and rigorous in correcting them. |

Let's break each of the five values down in more detail.

slide 11

Integrity

Integrity means we:

- Act with high moral principle.
- Adhere to the highest professional standards.
- Maintain the trust and confidence of all with whom we engage.

slide 12

Commitment

Commitment means we:

- Work diligently to serve Veterans and other customers.
- Are driven by an earnest belief in VA's mission.
- Fulfill our individual and organizational responsibilities.

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Advocacy

Advocacy means we are truly Veteran-centric by identifying, fully considering, and appropriately advancing the interests of Veterans and other beneficiaries.

slide 14

Respect

Respect means we:

- Treat all those we serve and with whom we work with dignity and respect.
- Show respect to earn it.

slide 15

Excellence

Excellence means we:

- Strive for the highest quality and continuous improvement.
- Are thoughtful and decisive in leadership.
- Are accountable for our actions, willing to admit mistakes, and rigorous in correcting them.

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Demonstrating Core Values In Your Job Every Day

Every day, you have the opportunity to demonstrate who you are as a VA employee and what the VA stands for as you interact with customers and colleagues. As you perform your duties as a PCR, look for opportunities to demonstrate VA's core values.

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VA's Core Characteristics

The Core Characteristics further define "what we stand for" and what VA strives to be as an organization.

The six core characteristics are:

- *Trustworthy*
- *Accessible*
- *Quality*
- *Agile*
- *Innovative*
- *Integrated*

Let's take a moment to break each down in more detail.

slide 18

Trustworthy

VA earns the trust of those it serves – every day – through the actions of all employees. That includes you and me!

slide 19

Accessible

Accessible means:

- VA engages and welcomes Veterans and other beneficiaries, facilitating their use of the entire array of its benefits and services.
- Each interaction will be positive and productive.

slide 20

Quality

Quality means VA provides the highest standard of care and services to Veterans and beneficiaries while managing the cost of its programs and being efficient stewards of all resources entrusted to it by the American people.

slide 21

Agile

Agile means VA anticipates and adapts quickly to current challenges and new requirements by continuously assessing the environment in which it operates and devising solutions to better serve Veterans, other beneficiaries, and Service members.

slide 22

Innovative

Innovative means VA:

- prizes curiosity and initiative
- encourages creative contributions from all employees
- seeks continuous improvement
- and adapts to remain at the forefront in knowledge, proficiency, and capability to deliver the highest standard of care and services

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Integrated

Integrated means VA:

- links care and services across the Department
- with other federal, state, and local agencies
- with other partners

- and with Veterans Services Organizations (VSOs) to provide useful and understandable programs to Veterans and other beneficiaries
- VA's relationship with the Department of Defense is unique, and VA will nurture it for the benefit of Veterans and Service members

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VA Customer Service

Employees must understand VA customer service relationship with callers differs from the standard customer relationships built in other businesses.

slide 25

- Standard Business Customer Service Relationship = callers pay for a service

slide 26

- VA Customer Service Relationship = callers have already earned their benefits and service due to their service to our country by Veteran or members of the beneficiaries' family.
- Earning the trust of Veterans, beneficiaries, and their families.

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Strategies of Customer Service

A customer service strategy details how you will interact with your caller – this can set the mood of the caller's attitude from their first contact through the life of the business relationship.

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Listening

Identify the callers needs by asking questions and concentrating on what the caller is really saying. Listen to their words, the tone of voice, and most importantly, how they feel. Beware of making assumptions, thinking you intuitively know what the caller wants. Effective listening and undivided attention are particularly important while providing the best customer service to our Veterans, Beneficiaries, and family members.

INSTRUCTOR NOTE: Hold and interactive discussion with trainees regarding what they think it means to "listen" to callers.

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Identifying/Anticipating the Needs of the Caller

Most callers' needs are emotional rather than logical. The more you know your caller, the better you become at anticipating their needs. Clear and concise communication assists in keeping you aware of problems or upcoming needs throughout the duration of the call.

INSTRUCTOR NOTE: Provide examples of when a trainee would need to ask more probing questions, to assist the caller.

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Making the Caller Feel Important and Appreciated

Treat all callers as individuals. Remain professional but remember to be sincere, individual value sincerity. Sincerity creates a good feeling and starts the process of building trust throughout the duration of the call. Thank them every time you get a chance.

INSTRUCTOR NOTE: ASK trainees of some customer service experiences where they have been made to feel important and appreciated.

ASK trainees of some customer service experiences where they have been made to feel disrespected and underappreciated.

slide 31

Understanding the Caller

It is imperative that you assist the callers in understanding VA's programs. The VA may have some of the best programs available for our callers, but if the callers don't understand the programs, they can get confused, impatient, and angry. Take time to explain how our programs work. Be sure you do not reduce the human element of your call.

INSTRUCTOR NOTE: DISCUSS with trainees' instances where it can be difficult to explain information to the callers. (i.e., TBI's, PTSD, language barriers.)

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Knowing How to Apologize to the Caller

When something goes wrong, apologize. It's easy, and the callers will appreciate the initiative. Even though the caller may not always be right, it is important to remain professional and sincere. Apologizing does not mean you are wrong; it simply reflects the regretful acknowledgement of an offense or failure. This is not necessarily your personal failure, but the failure of something beyond your control. By apologizing it lets your caller know you are sincere. As hard as it is you must learn to value the caller's complaints. As much as we may dislike it, it affords us an opportunity to improve. Even if a caller is having a bad day, go out of your way to make them feel comfortable.

INSTRUCTOR NOTE: DISCUSS with trainees some instances of where the PCR may have to apologize to the caller.

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Giving More than Expected

Our overall goal is to keep our callers happy, think of ways to elevate yourself above and beyond. Consider the following:

1. What can you give callers that they cannot get elsewhere?
2. What can you do to follow-up and thank callers even when they were not easy to deal with?
3. What can you give callers that is totally unexpected?

INSTRUCTOR NOTE: ASK trainees of some other ways you can give more than expected during calls:

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Introduction to Public Service Guide Modules

Next we will move into the Public Service Guide (PSG). The PSG will be visited throughout new hire training. There are four modules that will include an overview of each topic, class discussion and practical exercises. This training is designed to improve your customer service skills as well as refining specific skills you already possess. The goal of the PSG is to have a model for customer service skills throughout all the call centers to ensure consistency and effectiveness.

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Public Service Guide Outline

Module 1 covers listening skills, critical thinking, and time management & stress.

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Public Service Guide Outline

Module 2 covers conversation control and identifying various types of callers.

slide 37

Public Service Guide Outline

Module 3 covers problem solving and conflict resolution.

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Public Service Guide Outline

Module 4 covers Emotional Intelligence.

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Introduction to Listening Skills

"Listening is as powerful a means of communication and influence as to talk well."

- John Marshall, Chief Justice of the Supreme Court of the United States, 1801-1835.

INSTRUCTOR NOTE: ASK trainees what they believe the importance of listening means.

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Introduction to Module 1: Listening Skills

Benefits of Listening Effectively

- Building relationships
- Increasing productivity
- Solving problems
- Avoiding unnecessary conflict

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Introduction to Module 1: Listening Skills

INSTRUCTOR NOTE: Choose two volunteers to read each column for ineffective and effective listeners.

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Introduction to Module 1: Listening Skills

Steps to Active Listening

1. Receive the message
2. Review the message
3. Respond to the message
4. Remember the message

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Introduction to Module 1: Listening Skills

Receive the message

- Hear the message
- Show you are listening
- Interrupt only when necessary

slide 44

Introduction to Module 1: Listening Skills

Review the message

- Clarify
- Use critical thinking skills

slide 45

Introduction to Module 1: Listening Skills

Respond to the message

- Show you understand the message
- Determine the appropriate response

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Introduction to Module 1: Listening Skills

Remember to the message

- Make the message memorable
- Visually link items

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Introduction to Module 1: Listening Skills

Skills to Improve Understanding

- Questioning techniques
- Uncover hidden messages

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Introduction to Module 1: Listening Skills

Questioning Techniques

- Clarify
"I'm confused about..." or "Can you explain ...?"
- Probe
"Tell me more about..."
- Confirm
"So, from what you've said, I'm assuming..."
- Acknowledge
"I sense you're feeling overwhelmed by..."
- Build
"That's a good point. What else?"

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Introduction to Module 1: Listening Skills

Uncover Hidden Messages

- Hear more than the actual words
- Tone of voice

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Introduction to Module 1: Listening Skills

"I told him to wait." Exercise

INSTRUCTOR NOTE: Read the sentence in the "word emphasis" column and emphasize the word in bold. Next read the text in the "meaning" column to show the importance of emphasizing specific words. After the entire table has been read, emphasize to trainees how the meaning of a sentence can change depending on what word is emphasized.

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Introduction to Module 1: Listening Skills

Listening in Emotional Situations

- **Recognize your hot buttons**
- **Avoid behaviors that escalate emotions**
- **De-escalate emotions**

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Introduction to Module 1: Listening Skills

Recognize Your Hot Buttons

- When have you spoken or acted impulsively and regretted it afterward?
- What triggered your response? Was it something someone said or did?
- Is there a pattern?
- Do your friends, family or co-workers know what "sets you off"? Can they tell you what makes you irritated or difficult?

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Introduction to Module 1: Listening Skills

Avoid Behaviors that Escalate Emotions

- Interrupting
- Arguing
- Telling the other person to calm down
- Giving advice
- Faking understanding
- Belittling, condescending, or minimizing
- Jumping to conclusions

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Introduction to Module 1: Listening Skills

De-Escalate Emotions

- Respect the emotional person's perceptions.
- "If it were me, I might be feeling..."
- Set clear boundaries while allowing the person to talk.
- "I'm here to listen, but I can't do that until you slow down and stop swearing."
- Use nonthreatening words and an even-tempered voice.
- Keep responses short.

slide 55

Module 1 Recap

In this first module we discussed listening skills and the benefits of listening effectively. The benefits of listening effectively are:

- Building relationships
- Increasing productivity
- Solving problems
- Avoiding unnecessary conflict

slide 56

Module 1 Recap

In this first module we discussed steps to active listening. The steps to active listening are:

1. Receive the message
2. Review the message
3. Respond to the message
4. Remember the message

slide 57

Module 1 Recap

In this first module we discussed listening in emotional situations. We must remember to:

- Recognize your hot buttons
- Avoid behaviors that escalate emotions
- De-escalate emotions

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Group Activity

Split up the trainees into groups of 3 to 4 people. Each group member should discuss their first job to include the name of the employer, what their job title was, how long they worked in the job and a skill they developed by working in that job. Each group member should be prepared to share their other team members job experiences with the entire class.

INSTRUCTOR NOTE: Allow approximately 10 minutes for a small group discussion. The instructor should call on someone from each group to provide 2 examples of job experiences from each group. This exercise is to demonstrate the importance of developing and polishing listening skills to ensure they are actively listening. Emphasize to trainees the importance of active listening in the call center when determine caller's needs.

slide 59

Introduction to Emotional Intelligence

Next we will discuss emotional intelligence. This topic will be discussed during each part of the PSG.

slide 60

INSTRUCTOR NOTE: ASK trainees: "What is Emotional Intelligence?" Allow the class to provide multiple answers.

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Emotional Intelligence

Emotional intelligence is the ability to monitor one's own and others' feelings and emotions, to use this information to guide one's thinking and actions toward others.

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Emotional Intelligence

It is important to keep in mind that emotional intelligence is the ability to identify, use, understand and manage emotions in positive and constructive ways. It also means recognizing your own emotional state and the emotional state of others.

slide 63

Emotional Intelligence

There are various aspects of emotional intelligence:

- Intrapersonal Skills
- Interpersonal Skills
- Adaptability
- Resilience

slide 64

Emotional Intelligence

INSTRUCTOR NOTE: READ each column for the corresponding skill.

We will go in depth to each skill and aspect of emotional intelligence through the PSG.

slide 65

Group Activity

Now we will split up into groups of 3 to 4 people. As a group you will choose which characteristics fall under low or high emotional intelligence. The list of characteristics is located on Pg. 17 of your participant guide. Once each group has completed assigning characteristics to the two groups, the class will meet back and discuss each one together.

INSTRUCTOR NOTE: Allow approximately 10 minutes for a small group discussion. The instructor should call on someone from each group to provide their list of characteristics that fall under low or high emotional intelligence. This exercise is designed to get trainees thinking about what they know about emotional intelligence and which characteristics fall in line with low or high emotional intelligence. It is not expected that trainees will get each answer correct. This exercise will be completed later in the PSG to gauge the trainee's improvement in understanding of emotional intelligence. Instructor should not click to slide 66 until the group has completed the discussion.

slide 66

Emotional Intelligence

INSTRUCTOR NOTE: Compare the list provided on this slide to the list the trainees came up with and note any differences.

Knowledge Check

INSTRUCTOR NOTE: For all Knowledge Checks, click to reveal the answer in the PowerPoint.

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What do the letters stand for in the acronym I CARE?

Answer:

I - Integrity

C – Commitment

A - Advocacy

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R – Respect

E - Excellence

slide 68

What is the difference between standard customer service and VA customer service?

Answer:

Standard Business Customer Service Relationship = Customers pay for a service

VA Customer Service Relationship = Veterans, Survivors, and their families have already earned their benefits and service due to the Veteran's service to our country.

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Knowledge Check

Match the Top Strategies of Customer Service letter to the most appropriate action.

- (A) Listening
- (B) Identifying/Anticipating the Needs of the Caller
- (C) Making the Caller Feel Important and Appreciated
- (D) Understanding the Caller
- (E) Knowing How to Apologize
- (F) Giving More than Expected

1. *It's easy and the callers will appreciate the initiative.*

Answer: E

2. *Be sure you do not reduce the human element of your call.*

Answer: D

3. *Process of building trust throughout the duration of the call.*

Answer: C

4. *Our overall goal is to keep our callers happy, think of ways to elevate yourself above and beyond.*

Answer: F

5. *Identify the callers needs by asking questions and concentrating on what the caller is really saying.*

Answer: A

6. *Most callers' needs are emotional rather than logical.*

Answer: B

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What are four benefits of listening?

Answer:

- 1. Building Relationships**
- 2. Increasing Productivity**
- 3. Solving Problems**
- 4. Avoiding Unnecessary Conflict**

slide 71

List four steps of effective listening.

Answer:

- 1. Receive the message**
- 2. Review the message**
- 3. Respond to the message**
- 4. Remember the message**

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What is the definition of Emotional Intelligence?

Answer:

The ability to monitor one's own and other's feelings and emotions, to use this information to guide one's thinking and actions toward others.

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Summary

Trainees should be able to:

- Recall VA I CARE Values
- Recall VBA's mission and vision statement
- Provide the difference between Standard Business Customer Service and VA Customer Service.
- Identify six (6) strategies of customer service.
- Identify the four (4) modules of the Public Service Guide.
- Understand the importance of listening skills
- Define Emotional Intelligence

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Questions & TMS Survey:

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INSTRUCTOR NOTE: Use remaining time to allot for questions and comments.
Ensure you remind trainees to complete the TMS survey.