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| Facilitation Guide |
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| Date here | Service Foundations Training |

Guide to assist Facilitator’s delivering Service Foundations Training to staff and volunteers of the **[ORG NAME]**

**Photos are from Toronto Humane Society, best to replace with your own organization’s photos.**

Facilitation Guide

Service Foundations Training

# SECTION I: FACILITATOR NOTES

A: Overarching Goal & Key Understandings

Participants will develop a working understanding of how to handoff visitors, respond to frustrated/upset clients, and provide constructive feedback to colleagues in order to improve service. This guide is designed to provide support to facilitators of this session.

## B: Session Objectives

* Understand the warm hand-off.
* Understand and apply the Three R’s.
* Understand and apply Fearless Feedback.

## C: Evidence of Learning

* Participants will utilize warm handoffs with clients/visitors.
* Participants will use the Three R’s this month with a frustrated/upset client.
* Participants will consistently use the Three R’s when dealing with frustrated/upset clients.
* Participants will provide fearless feedback to at least 3 colleagues within 3 months.
* Participants will continue to apply fearless feedback to all levels of the organization.
* Participants will receive fearless feedback in an open and receptive manner.

D: Timing: 2 Hours

E: Target Audience Suggested Participants: All Staff and Volunteers.

## F: Class Size Limit: 15

# Training AGenda

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| Modules | Time |
| Opening & Introductions | 20 minutes |
| The Warm Handoff | 15 minutes |
| The Three R’s – Recognize, Respond Empathetically, Reassure | 40 minutes |
| Fearless Feedback | 30 minutes |
| Closing | 5 minutes |
| *Time Buffer* | *10 minutes* |

# Planning & materials

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| Task | P |
| Bring a bottle of water for yourself |  |
| Arrive at training room at least 15 minutes before the start time |  |
| Arrange tables and chairs for groups of 4 to 6 |  |
| Set up computer and projector with PowerPoint |  |
| Test video |  |
| Set up flip chart and markers or paper and pen for “parking lot” |  |

# Section 2: overview of the modules – Quick reference table

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| --- | --- | --- |
| **Module** | **Purpose & Content** | **Slide Numbers** |
| **Opening & Introductions** | | |
| Welcome | * Engage with participants as they enter the room * Ask participants to identify any accommodation need | 1 |
| Facilitator and Participant Introductions | * Introduce yourself and co-facilitator(s) * Participants introduce themselves * Give overview of the agenda for the session | 1 |
| Who Are We? Why Are We Here? | * Everyone has a part in client engagement and internal communication * Connection between the organization’s mission and engaging the community and our clients | 2-3 |
| **Activity #1** | * Broken telephone activity | 4 |
| **The Warm Handoff** | | |
| Into to the Warm Handoff | * Make clients feel welcomed, minimize confusion, and create a positive and engaged experience | 5 |
| **The Three R’s – Recognize, Respond Empathetically, Reassure** | | |
| Addressing Concerns | * Intro to the Three R’s and addressing client concerns * Utilize skills to turn client frustrations or misunderstandings into positive outcome/experience | 6 |
| Sympathy v Empathy  **Video #1** | * Brené Brown video – Empathy v Sympathy * Take-up of video * Qualities of empathy | 7-9 |
| Intro to the Three R’s | * Intro to Recognize, Respond Empathetically, Reassure | 10-11 |
| **Activity #2** | * Break participants into triads * 3R examples * Take-up activity | 12-15 |
| **Fearless Feedback** | | |
| Intro to Fearless Feedback | * Work as a team to improve together, through honesty and genuine conversation | 16-17 |
| **Activity #3** | * Break participants into triads * Fearless Feedback examples * Take-up activity | 18-19 |
| **Closing** | | |
| Recap | * Summarize the three concepts – the Warm Handoff, 3R’s, Fearless Feedback | 20 |
| Questions  Encouragements &  Thank You’s | * Answer any remaining questions * Encourage participants to use the skills they learned * Thank them for attending and participating | 21 |

# section 3: Module Content

## Module 1 – Introductions

## Slide 1

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| Opening & Introductions10 minutes(Times are approximate)Supporting Materials*Flipchart (optional)* | Core Concepts:  1. Welcome – Pre-training    1. Greet participants as they enter the room    2. Ask participants to let you know if they have any accommodation needs for the session (e.g. hard of hearing, sight issues, religious needs, etc.) 2. Start of Training & Introductions    1. Facilitators introduce yourselves    2. Go around the room and have Participants introduce themselves – name and position 3. Give overview of the agenda for the session    1. *We will be discussing 3 service concepts that are being implemented for all staff*    2. *There will be activities including group work that all participants will be involved in* 4. Encourage participation    1. *Their participation throughout the training is vital for its success*    2. *No one is going to have to present in front of the group*    3. *They should feel free to ask questions, share stories throughout the session* 5. Create a parking lot    1. *We will create an area to write down issues where we don’t have the answers or tangent conversations that we can get back to at the end if we have time or we’ll follow up afterwards*  General Notes:  * Be visibly excited to be sharing this presentation * Take time to engage each person in the room |

## Slide 2-3

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| Review of Purpose of THSWho are we? Why are we here?8 minutesSupporting Materials*None* | Core Concepts:  1. Everyone has a part to play in client engagement and internal communication. 2. Be open-minded and engaged throughout this presentation. 3. We rely on donations from the public. It is imperative that anyone interacting with **[ORG NAME]**  has a positive experience.  General Notes:  * *Regardless of what department you work in, or what your role is, everyone who works here at* ***[ORG NAME]*** *is doing so to ultimately support the same cause.* * *The training that is outlined within and that will be reviewed today exists to strengthen your client and peer relations skill sets. Some of this might be familiar to you, and some of it might be completely new territory to you.* * *We ask that you approach this with an open-mind and an excitement to participate.* * *All of our supporting values get us to what we do every single day* * *These animals are why we’re here*  Core Concepts:  * Have 3 different participants read out one paragraph each.   1. *Through every interaction, the THS strives to strengthen the human-animal bond and create allies in the community – individuals who advocate for animal welfare and* ***[ORG NAME]***  *mission*   2. *This is accomplished by treating every individual who engages with* ***[ORG NAME]***  *with a welcoming, compassionate, and empathetic approach*   3. *It is through these actions, that* ***[ORG NAME]***  *will lead and inspire humane action and ultimately maximize our life-saving ability* * Connect the dots between **[ORG NAME]**  mission and engaging the community and our clients.   1. *Employees/Volunteers goals are the same regardless of position*   2. *We rely on donations and the good will of the community to raise money, fine homes for the animal in our care, attract* volunteers *and foster parents*   3. *It’s vital that every visitor to the Shelter leaves with a positive experience*  General Notes:  * We must foster a great team culture with all involved with **[ORG NAME]** * Have a culture where everyone feels welcomed, included, etc. |

## Slide 4

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| Communicating with Others10 minutesSupporting Materials*Activity #1* | Core Concepts:  1. Despite positive intention, communication can become convoluted and create misunderstanding. 2. Consider internal communication as well as communication with our clients.    1. *The key behind this is that this idea of a broken telephone game can easily translate to the understanding of how a customer or client in an unfamiliar setting can just as easily get lost in the shuffle.*    2. *Their needs might get misinterpreted or lost all together; resulting in a negative experience.*  Activity – Broken Telephone Game In this activity you run a phrase through the room’s participants by playing a simple game of broken telephone.   * Explain game to participants   + *“For those of you who are unfamiliar with broken telephone I will whisper a statement into the ear of one person. That person then whispers the same statement to the next person and so on until everyone has heard the statement. The last person to hear the statement will tell the group what the statement is.”*   + Explain if any employees have a hearing disability they can still participate, in fact, that will just support the point of the exercise   + Ensure noise in the room, encourage participants to talk amongst themselves during the activity   + Start with the first participant and whisper in their ear the following statement:   *“Where can I find Fluffy, the bronze brindle basset hound, 9 years old, with a floppy ear that came in as an owner surrender 3 days ago”*  **Take Up Activity**   * Have last person in the chain state what they heard * It should be very different from the starting sentence * We do this exercise to illustrate that messages can be convoluted and become mixed up |

## Module 2 – The Warm Handoff

## Slide 5

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| The Warm Handoff10 minutesSupporting Materials*None* | Core Concepts:  1. This is how we can make clients feel welcomed, minimize confusion, and create a positive and engaged experience for everyone at **[ORG NAME]** 2. Get into the habit of doing this with every single client, every single time  General Notes:  * *The idea behind the warm hand off is simple. If someone that you approach (or if they approach you) is seeking help or information that is more appropriately served by another individual or area – help them get that support.* * *How many times have you gone shopping for instance and someone has told you “sorry that’s not my department” or “you just need to go down that way” and you end up getting lost or frustrated due to the lack of help?* * *A warm hand off means listening to that person’s needs and introducing them to the correct and best resource/person to help them with those needs. This includes briefly reiterating their needs to that person so the individual seeking support doesn’t feel as though they need to keep repeating themselves.* * *The warm transfer simply exists to prevent this negative experience.*   A few things to keep in mind:   * Degree of warmth   + Gradient of how warm the hand-off is dependent on staff member’s knowledge of department function, names, etc. * Be polite and happy to help that individual get the best help possible * Don’t be afraid to interrupt a colleague. Whether this means politely pausing the individual let them know you’re not the right resource but will help them get there – or politely interrupting a colleague you’re looking to warm transfer to in order to let them know that someone is waiting for their help * Reiterate their needs as mentioned above and introduce them by name if you captured this information; this shows you cared as you actively listened to them   What does this mean to **[ORG NAME]**?   * + Consider the client experience. [anything quirky about org? Size? Layout?]   + [If relevant - If someone pointed me in any direction, I would still feel lost]   + Consider a big department store when you’ve asked for directions to a specific item/location   + This can lower the satisfaction, engagement that the client has – just to get to this point was unnecessarily challenging   What concerns do you have in your roles to facilitate this?  Ask group what concerns they have about implementing the warm handoff and then respond or ask the group for ideas.   * Offer help to everyone “Hey can I give you a hand with anything?”   + Do not assume that everyone has already been helped or does not require help   + “Status check” for people waiting – just get an update from the correct people on potential wait time * Barriers to the Warm Handoff   + Time   + Not knowing the right place   + Required staff are busy with other clients   + What if I don’t know the staff’s name? * Responsibility falls on staff to interrupt their own conversations and touch base * Dog walking – Safety first but do the best warm hand-off you can * When do we stop what we’re doing? What is process and warm hand-off? * Can I talk about the dog as a junior staff member? The answer is YES |

## Module 3 – The Three R’s – Recognize, Respond Empathetically, Reassure

## Slide 6

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| Addressing Concerns5 minutesSupporting Materials*None* | Core Concepts:  1. Intro to the Three R’s and addressing the concerns that unsatisfied clients are facing with our services and programs 2. Each of us can utilize our skills to turn a client’s frustration or misunderstanding into a positive outcome and experience  General Notes:  * Addressing concerns is an integral component and expectation of any job involving customer service or client interactions. * It also goes beyond this when you think about the interactions you have in your daily lives. Sometimes this will go beyond the people you serve at work to include your colleagues and peers, your managers, and even your family and friends. * As we go through this it’s also important to distinguish the difference between sympathy and empathy – and how empathy goes much further in improving your interactions. * To help us understand let’s review this video on the topic by Brené Brown. |

## Slide 7-9

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| Empathy v Sympathy10 minutesSupporting MaterialsVideo #1: Ted Talk by Brené Brown – Empathy v Sympathy(length in minutes 2:53) | **Video**  Play Brené Brown Video on Empathy vs. Sympathy:  <https://www.youtube.com/watch?v=1Evwgu369Jw> Core Concepts:  * Recap of the video and importance of exercising empathy over sympathy   + Sympathy – feeling pity or sadness for someone else’s state of misfortune     - Acknowledging another person’s emotional hardships and providing comfort and assurance but removed from it   + Empathy – ability to understand, connect with, and share the feelings of another person     - Understanding what others are feeling because you have experienced it yourself or can put yourself in [their](https://www.diffen.com/difference/Their_vs_There) shoes.  General Notes: To reiterate   * If someone has escalated or is frustrated, something has led them to feel this way * Until we identify what this is, we won’t be effective in empathetic response * Be genuine   4 Qualities of Empathy – Theresa Wiseman   * Perspective taking – ability to take the perspective of others * Staying out of judgement – not easy! * Recognizing emotion in others * Communication/share the emotion |

## Slide 10-11

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| Intro to the Three R’sRecognizeRespond EmpatheticallyReassure10 minutesSupporting Materials*None* | Core Concepts:  1. Intro to Three R’s concept 2. Focus on being truly genuine in these conversations   \*IF NOT BROKEN INTO GROUPS OF 3, DO SO NOW General Notes:  * The Three R’s are a guideline that can be used to begin/continue a conversation when addressing the concerns of another individual, whether they are a client, peer, family member, friend, or generally any other individual you might meet. * The first point is to RECOGNIZE what it is that the individual might be experiencing as a point of concern or distress. This might be an aspect of the environment or situation at hand, something they have misinterpreted, or even just a perception they have. Listen to what they are saying and try to empathetically understand what the concern is. * Next RESPOND EMPATHETICALLY by either aligning with how they might be feeling, relating through a shared experience, or being completely truthful if this is something new to you and you truly can’t begin to imagine what they are going through right now. * But the key is also to always REASSURE the individual that there is some form a solution or answer at hand. This does not always mean that this will be the perfect or most desired answer. But if you genuinely show that you are doing everything you can to help them in the most appropriate manner – this is what matters. * BE GENUINE   *Take this example of an individual who missed out on a dog they wanted to adopt*.  *Let’s look at an example of how one of these statements could be positioned:*  **Recognize –** *I understand you were so excited to adopt and I’m sorry that the dog you wanted is no longer available*  **Respond Empathetically –** *I remember when I first started the adoption process for my dog and how excited – and truthfully, a bit stressed – I was about it too. It’s a big decision!*  **Reassure –** *While it might not have worked out this time, we have many other dogs looking for a home and I’m sure there’s one out there for you. I’d be happy to help you. (or take you to someone who can help you - warm handoff)* |

## Slide 12

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| The Three R’s30 minutesSupporting Materials*Activity #2* | **Activity**  In their groups of 3:   * The members of each triad need to assign amongst themselves the role of Client, Employee, and Observer (they will be switching roles twice more so that every Participant does each role). * Client will read out the complaint and expand on it if moved to do so * Employee will respond using 3 R’s * Observer will provide feedback to Employee on their use of the 3 R’s   “*I feel like I’ve been waiting over an hour to get some help around here!”*  Note: Facilitators should walk around the room and help any groups that are struggling or provide encouragement for those on the right track  **Take up with whole group**   * How did that feel for the people who were the Employees? * Does anyone want to share their response?   Possible Activity Example:  *Rec – That is terrible to hear you’ve been waiting for so long, that must be frustrating*  *Res – I get so annoyed when I’m waiting in line myself, especially when it doesn’t seem it’s too busy*  *Rea – Let me check in with the department staff and see what the hold-up is and try to get someone to help you out*  **Core Concept:**  **Have the participants switch roles and move onto the next example**  *“I can’t afford to pay that price for this service, why can’t you just help me for free?”*  Note: remember to walk amongst the groups  **Take up with whole group**   * Does anyone want to share their response/experience?   Possible Activity Example:  *Rec – Veterinary bills can be so expensive and difficult to manage, especially since these things are so unexpected*  *Res – I know when my dog got sick, I was in a full panic on how I would be able to afford the care for him*  *Rea – While we can’t provide care for free as we have a lot of homeless pets to help, we are going to do everything we can to work with you on a fair price for your services and get your pup feeling better*   * Have a discussion with the group about avoiding the solution-oriented focus * Sometimes it seems easier to just try to solve the problem, but that doesn’t always satisfy someone who is upset, they want to be heard. Take the time to engage and empathize before trying to solve the problem * Employee could have gone straight to trying to offer payment plans or getting a manager to approve a discount but that doesn’t address the client’s emotional state   **Core Concepts:**  **Have the participants switch roles and move onto the last example**  *“Why can’t I pet this dog through the bars, he’s such a sweetheart, this is crazy!”*  Note: remember to walk amongst the groups  **Take up with whole group**  Possible Activity Example:  *Rec – Oh my gosh, I know! Milo is such a cutie.*  *Res – Working here and loving animals as I do I just want to pet all them all day long*  *Rea – But it’s actually very stressful for the animal having all these visitors petting them and it can also spread diseases. Let me introduce you to our awesome adoption team, they will be able to walk you through all the steps needed to meet the dogs – as a bonus, it will be in a room or outside, not just through the bars!*   * Have a discussion about not just informing people about the rules, exercise the 3 R’s! * 3 R’s vs. Informing   **Core Concepts:**   1. Debrief exercise 2. What questions do you have?   **Take Up Activity**   * The 3 R’s technique lets the client be heard * Allows you to connect with the client * Offers reassurance   Extra 3R Examples  Other examples that can be used for Activity #2  Client Care:     1. Client can’t afford public veterinary care 2. THS can’t help with that veterinary care request 3. Client has been waiting for a long time on hold over the phone to book an appointment 4. Animal is not available for adoption 5. Multiple meet and greets required for adoption, All household members need to be present for adoption 6. The fees for this service is too costly 7. You aren’t able to surrender your dog today, but another day     Shelter Care:    Public putting hands into animal cages  Staff/Volunteers not following appropriate biosecurity rules  Public in closed animal housing rooms  Staff/Volunteers not adhering to handling levels  Staff/Volunteers not following rules on walk list  Foster Care:     1. Foster parents not adhering to supply pick-up rules 2. F2A foster parents not complying with schedule/requirements of program |

## Module 4 – Fearless Feedback

## Slide 16-17

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| Intro to Fearless Feedback10 minutesSupporting Materials*None* | Core Concepts:  1. Work as a team to improve together, through honesty and genuine conversation 2. Focus on key terms/phrases here in discussions    1. Open, Receptive, Assume positive intent    2. Not to assign blame, pass judgement    3. Proactive 3. Timely and Specific!  General Notes:  * The goal should be to use this **IN THE MOMENT** or as close to the time of an event or situation as possible. This focus on recency makes the feedback timely and relevant. * “Has someone ever shared feedback or a thought with you on something you did a long time ago in the past? Maybe you don’t remember it. Maybe you’re wondering why they brought this up out of the blue now. Maybe you’re wondering what they’re hoping to achieve in talking about this at this time. Or all of the above.” * Feedback shared in the moment or as close as possible helps us to learn and grow from these circumstances. Positive feedback will help to reinforce a desired behaviour. While negative feedback will hopefully help us to prevent the same undesired behaviour from happening again. * Feedback is also for **EVERYONE**. In order to have an effective feedback culture within an organization it should truly be 360 degrees in scope. All individuals should feel comfortable sharing AND receiving feedback openly from peers, volunteers, supervisors, managers, etc. * As indicated on the slide, fearless feedback means to objectively share feedback on an observation or behaviour. It is not to assign blame or to interpret a personal motive. It should be objective in nature for that person’s development. Fearless feedback should always be considered and used with **POSITIVE INTENT**. Share feedback because you care. Accept feedback because that individual cared enough to share it to you. * As this gets more commonplace within the THS this doesn’t mean we should start bringing up various past issues or concerns. Focus on the moment and situation at hand. How will that feedback further the growth of others and **[ORG NAME]**?  Core Concepts:  1. The specificity of feedback is extremely important – Every time we provide feedback, it should be a specific as possible 2. No feedback sandwiching! – Two positive feedbacks with a negative feedback sandwiched in between.  General Notes:  * This grid it is broken down on two axis.   + Negative – Positive   + General – Specific * Negative: an undesired behaviour or result which has had a negative impact on the success of others or the THS * Positive: a desired behaviour or result which has had a positive impact on the success of others or the THS * General: very simple in nature such as a passing “good job”, “thumbs up”, “not good”, etc. * Specific: a comment which specifically indicates behaviour or result and the direct or perceived impact that has had on another individual or group of people.   **Give an example of each type of feedback.**   * General Positive – “Good job just then” * Specific Positive – “I noticed when that client started getting frustrated and raised their voice you stayed really calm and listened to them and restated their concerns and they calmed right down. That was really well done” * General Negative – “You didn’t deal with that customer very well” * Specific Negative – “When you were talking with that client just now you cut them off mid-sentence and I saw the client bristle. The client seemed to get angrier at that point and started yelling.” |

## Slide 18-19

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| Communicating with Others10 minutesSupporting Materials*Activity #3* |

## Module 5 – Closing

## Slide 20-21

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| RecapQuestionsEncouragements &Thank You’s5 minutes | * Get participants to commit to practicing the Warm Handoff right away * Get participants to commit to using the Three R’s this week with a client/visitor * Get participants to commit to providing Fearless Feedback to 3 colleagues in the next 3 months * Get participants to commit to being open to receiving Fearless Feedback   “Any further questions/thoughts/comments?” |