**TEXAS CTE LESSON PLAN**

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| **Lesson Identification and TEKS Addressed** | |
| **Cluster** | Human Services |
| **Course** | Practicum in Human Services |
| **Lesson/Unit Title** | Client Retention: Services, Techniques, and Resources |
| **TEKS Student Expectations** | **130.280. (c) Knowledge and Skills**  (3) The student uses oral and written communication skills and solves problems using critical-thinking skills.  (A) The student is expected to practice effective verbal, nonverbal, written, and electronic communication skills  (B) The student is expected to use effective communication skills such as ability to empathize, motivate, listen attentively, and speak courteously and respectfully when working with clients  (C) The student is expected to apply appropriate customer service techniques to complete transactions  (D) The student is expected to investigate client resources and risk tolerance levels such as evaluating client resources versus cost, educating client about most beneficial choices, and recommending best products, plans, or services for the client |
| **Basic Direct Teach Lesson** | |
| **Instructional Objectives** | **Students will:**   * Summarize appropriate client service techniques to complete transactions * Investigate methods for recommending best products, plans or services for the client |
| **Rationale** | Establishing best practices for customer service are essential for the success of a business. What are the aspects of good client service? Why is it important to train employees on effective client service techniques? In preparation for careers in the field of Human Services, this lesson will provide an excellent opportunity to better understand the importance of effective client service, techniques, and resources. |
| **Duration of Lesson** | Three 45-minute class periods |
| **Word Wall** | **Client/customer/patron:** A person who pays a professional person or organization for services  **Courtesy:** Polite behavior that shows respect for other people  **Objection:** A reason for disagreeing with or opposing something: a reason for objecting  **Satisfaction:** The act of providing what is needed or desired: the act of satisfying a need or desire  **Transaction:** A business deal: an occurrence in which goods, services or money are passed from one person, account to another  **Tolerance:** Willingness to accept feelings, habits, or beliefs that are different from your own |
| **Materials/Specialized Equipment Needed** | **Equipment:**   * Computer with projector for PowerPoint presentation * Computers with Internet access (be sure to follow district guidelines)   **Supplies:**   * Beauty supplies found at a salon * Cash register * Employee handbook * Example of the use of social media by businesses * Loyalty punch card from a business * Shopping bags * Store receipts showing loyalty programs * Various store advertisements   **Other appropriate lessons**  How to Effectively Communicate with Clients Practicum in Human Services   * Copies of handouts   **PowerPoint:**   * Client Retention: Services, Techniques, and Resources * Presentation Notes for Client Retention: Services, Techniques, and Resources   **Technology:**   * Free iPad App:   + GoToMeeting<https://itunes.apple.com/us/app/gotomeeting/id424104128?mt=8> * Infographics:   + The Ultimate Customer Experience Looking for a reason to improve your customer service? According to Monetate: 73% of customers would purchase more if they had a superior customer experience, while 89% would stop doing business with a company after a negative experience.<http://assets.econsultancy.com/images/0001/8255/monetate_CX_infographic.png> * TedxTalk:   + Dan Ariely: What makes us feel good about our work? What motivates us to work? Contrary to conventional wisdom, it isn’t just money. But it’s not exactly joy either. It seems that most of us thrive by making constant progress and feeling a sense of purpose. Behavioral economist Dan Ariely presents two eye-opening experiments that reveal our unexpected and nuanced attitudes toward meaning in our work. <http://www.ted.com/talks/dan_ariely_what_makes_us_feel_good_about_our_work>   **YouTube:**   * Three Minute Teaching w/Tech Tip — Create Powerful Lessons in Minutes with Blendspace Tutorial on how to start a Blendspace presentation.<https://youtu.be/fsONWnbYGnM> * Customer Generation and Loyalty Program Learn how we help business not only secure their current customers, but also keep them coming back without many marketing and outreach services.<https://youtu.be/p06-N0WOWEY>   **Graphic Organizers:**   * Graphic Organizer – Customer Service * Note-taking Client Retention: Services, Techniques, and Resources   **Handouts:**   * Anticipation Guide – Client Retention: Services, Techniques, and Resources * Client Retention: Services, Techniques, and Resources Project * (Key) Anticipation Guide – Client Retention: Services, Techniques, and Resources * Rubric for Client Retention: Services, Techniques, and Resources Project * Transcript – Customer Service |
| **Anticipatory Set** | **Prior to class:**  Display as many of the lesson-related supplies (see Materials or Specialized Equipment Needed) as you have available on a table in front of the room. Supplies can include:   * Beauty supplies found at a salon * Cash register * Employee handbook * Example of the use of social media by businesses * Loyalty punch card from a business * Shopping bags * Store receipts showing loyalty programs * Various store advertisements   Look at the items on the table. How do the items relate to providing good client service?  Distribute the Anticipation Guide – Client Retention: Services, Techniques, and Resources handout prior to viewing the PowerPoint. Prior to the start of this lesson, the students will read each statement and place a check mark by each statement they THINK is true. After they have answered each statement, students are to put the handout away for later use during Lesson Closure. |
| **Direct Instruction with Special Education Modifications/**  **Accommodations** | Note to teacher: Prior to beginning this lesson, review, preview and select the appropriate multimedia for your classes.  Introduce objectives, terms, and definitions.  Distribute the handout Note-taking Client Retention: Services, Techniques, and Resources. Teacher will determine the notes to be recorded by students. Inform students that they will be expected to take notes and participate in discussions while viewing the slide presentation.  Introduce and discuss the PowerPoint Client Retention: Services, Techniques, and Resources. Allow time for questions, answers, and classroom discussion.  Use appropriate notes from Presentation Notes for Client Retention: Services, Techniques, and Resources for discussion.  Using the Note-taking Client Retention: Services, Techniques and Resources handout, students will have an opportunity to reflect upon, review and respond to the information pertaining to the PowerPoint. They will write a summary of topics or statements which reflect the information from the lesson:   * Discuss the topic * Write down your thoughts * Make a real-world connection to the lesson * How is this information helping you in a career in Human Services?   Allow for questions and answers to check for understanding.  Video included in slide presentation:   * Customer Generation and Loyalty Program Learn how we help business not only secure their current customers, but also keep them coming back without many marketing and outreach services.<https://youtu.be/p06-N0WOWEY>   Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:   * Checking for understanding * Encouraging participation |
| **Guided Practice with Special Education Modifications/**  **Accommodations** | Students will take a 30-minute online course on customer service. This self-paced training exercise is an introduction to customer service and how it impacts a business. Topics include:   * Defining what good customer service is * Implementing good customer service * How to improve customer service   Small Business Administration (SBA) Customer Service online course.<https://www.sba.gov/tools/sba-learning-center/training/customer-service>  Instruct students to take notes pertaining to the online course. Distribute the Graphic Organizer – Customer Service handout. They will complete each section with appropriate information. Students will be using the information from the online course to create a Blendspace presentation during Independent Practice.  Upon completion of the online course, students will receive a certificate of completion which may be placed in their portfolio.  Teacher note: A transcript of the online course has been provided for you. You may opt to allow ESL or Special Needs students to use the transcript as a reference. See Transcript – Customer Service for a copy.  Allow time for questions, answers, and classroom discussion.  Completion of the handout can be assessed as a daily grade.  Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:   * Repeating instructions * Providing assistance |
| **Independent Practice/**  **Laboratory Experience with Special Education Modifications/**  **Accommodations** | **Prior to activity:**  Teacher note: Students will go to <https://www.blendspace.com> to create their presentation. You will need to set up an educational account prior to start of the lesson. Instructions on how to create a Blendspace for beginners can be found at  Three Minute Teaching w/Tech Tip — Create Powerful Lessons in Minutes with Blendspace Tutorial on how to start a Blendspace presentation.<https://youtu.be/fsONWnbYGnM>  Teacher note: You may opt to demonstrate how to use Blendspace prior to the start of their project.  Divide class into groups of three.  Read the following scenario:  Your team has been accepted into an internship program at a local business in the Human Services Career Pathway. The manager who is your mentor has requested that your team create a presentation that focuses on effective client retention.  Distribute the Client Retention: Services, Techniques, and Resources Project handout. Instruct groups to think of effective tools and technology that can to be utilized to retain your client(s). Students will choose a business in the Human Services Career Pathways that will be the focus of their project. They will incorporate the information as a Blendspace presentation. Students will go to <https://www.blendspace.com> to create their presentation.  Students will use the Graphic Organizer – Customer Service as a resource. Their presentation must include:   * A clear focus on effective client retention techniques and resources * Five technology-based methods such as social media that can be used to enhance the client experience and retain clients * Methods for creating a good first impression for your clients * Steps to resolving client complaints * Three loyalty programs to encourage return business   Information is required to be retrieved from reliable sources.  Project will be presented during Lesson Closure.  Distribute and review Rubric for Client Retention: Services, Techniques, and Resources Project prior to the start of the assignment so that students are aware of assessment procedures.  Keep students focused and on task. Provide assistance if needed.  Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:   * Extending ‘wait time’ * Providing praise and encouragement |
| **Lesson Closure** | Review objectives, terms, and definitions.  Students will present their projects. Allow time for questions and discussion.  Re-distribute the graphic organizer Anticipation Guide – Client Retention: Services, Techniques and Resources used in the Anticipatory Set and allow students to revisit each statement. At the conclusion of the lesson, students will reread each statement and place a check mark by each statement they KNOW is true. They will provide information that PROVES other statements are not true. (Key) Anticipation Guide – Client Retention: Services, Techniques and Resources has been provided for your use. As class, compare the two sets of answers.  Allow for questions and class discussion. Check for understanding. |
| **Summative/End of Lesson Assessment with Special Education Modifications/**  **Accommodations** | Student projects will be presented to the class and assessed with Rubric for Client Retention: Services, Techniques, and Resources Project.  Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:   * Grading according to work done * Shortened, simplified instructions |
| **References/**  **Resources** | **Images:**   * Photos obtained through a license with Shutterstock.com.   **Websites:**   * Blendspace Create your own lesson today and start engaging your students with web resources.<https://www.blendspace.com> * Fonolo Ten Growing Customer Service Trends for 2015<https://fonolo.com/top-10-contact-center-trends-for-2015> * Houston Chronicle How Do I Define Good Client Service?<http://smallbusiness.chron.com/define-good-client-service-2081.html> * Small Business Administration (SBA) Customer Service online course.<https://www.sba.gov/tools/sba-learning-center/training/customer-service> * Smashing Magazine How to Deliver Exceptional Client Service.<http://www.smashingmagazine.com/2012/01/25/how-to-deliver-exceptional-client-service> * Smashing Magazine Eight strategies for successful client relations by Jeff Gardner.<http://www.smashingmagazine.com/2008/10/09/strategies-for-successful-client-relations/>   **YouTube:**   * Customer Generation and Loyalty Program Learn how we help business not only secure their current customers, but also keep them coming back without many marketing and outreach services.<https://youtu.be/p06-N0WOWEY> * Three Minute Teaching w/Tech Tip — Create Powerful Lessons in Minutes with Blendspace Tutorial on how to start a Blendspace presentation.<https://youtu.be/fsONWnbYGnM> |
| **Additional Required Components** | |
| **English Language Proficiency Standards (ELPS) Strategies** | * Word wall * Draw visual representation of terms on word wall * Add terms and definitions to personal dictionary * Check for understanding * Have students repeat instructions |
| **College and Career Readiness Connection[[1]](#footnote-1)** |  |
| **Recommended Strategies** | |
| **Reading Strategies** | Current Events: Assign students to read about the importance of client retention. Information can be found in newspaper articles, magazines, journals, and online print.  Suggestions:   * About Customer Service. Info Customer Service Improvement Checklist<http://www.aboutcustomerservice.info/index.php?pg=customer-service-improvement> * All Business Five Customer Service Pitfalls<http://www.allbusiness.com/five-customer-service-pitfalls-11470087-1.html> * Business 2 Community Customer versus Client: Is There a Difference?<http://www.business2community.com/customer-experience/customer-vs-client-difference-0861509> * Forbes Magazine Stop “Listening” and Start Anticipating Your Customer Needs.<http://www.forbes.com/sites/carminegallo/2014/05/28/stop-listening-and-start-anticipating-your-customers-needs/> * Have students form their own questions about the text prior to reading or have them write down any questions that come to mind as they are reading. * Encourage students to connect reading to their life experiences or prior knowledge. |
| **Quotes** | Make a customer, not a sale.  **-Katherine Barchetti**  The goal as a company is to have customer service that is not just the best but legendary.  **-Sam Walton**  Your most unhappy customers are your greatest source of learning.  **-Bill Gates**  Spend a lot of time talking to customers face to face. You’d be amazed how many companies don’t listen to their customers.  **-Ross Perot** |
| **Writing Strategies** | **Journal Entries:**   * Establishing best practices for customer service are essential for the success of a business because \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. * Five technology-based methods such as social media that can be used to enhance the client experience may include \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. * Two methods for creating a good first impression for your clients may include \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.   **Writing Strategy:**  RAFT (Role/ Audience/Format/Topic) writing strategy:   * Role: Owner of a business * Audience: New employee * Format: Memo * Topic: The importance of good customer service |
| **Communication 90 Second Speech Topics** | * I can resolve client complaints by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. * Three loyalty programs to encourage return business may include \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |
| **Other Essential Lesson Components** | |
| **Enrichment activity** | * Understanding individual values and personal qualities will help students communicate in a professional environment. Explain the differences between what a person values and qualities of an individual. Then have students write a statement of their own values and qualities.   **TED Talks:**  TEDx is a program of local, self-organized events that bring people together to share a TED-like experience. At a TEDx event, TEDTalks videos and live speakers combine to spark deep discussion and connection in a small group. These local, self-organized events are branded TEDx, where x = independently organized TED event.  The video below is related to this lesson. Allow students to view the video, and lead a discussion concerning the  TED Talk.  Dan Ariely: What makes us feel good about our work? What motivates us to work? Contrary to conventional wisdom, it isn’t just money. But it’s not exactly joy either. It seems that most of us thrive by making constant progress and feeling a sense of purpose. Behavioral economist Dan Ariely presents two eye-opening experiments that reveal our unexpected and nuanced attitudes toward meaning in our work. <http://www.ted.com/talks/dan_ariely_what_makes_us_feel_good_about_our_work> |
| **Family/**  **Community Connection** | * Student interns complete a weekly rotation log by asking the career related questions of a working adult (parent, grandparents, teacher and/or work mentor) |
| **CTSO connection** | **Family, Career, and Community Leaders of America (FCCLA)**  <http://texasfccla.org>  **STAR Events:**   * Chapter Service Project (Display and Manual): A team event – recognizes chapters that develop and implement an in-depth service project that makes a worthwhile contribution to families, schools, and communities. Students must use Family and Consumer Sciences content and skills to address and act on a community need. * Entrepreneurship: An individual or team event – recognizes participants who develop a plan for a small business using Family and Consumer Sciences skills and sound business practices. The business must relate to an area of Family and Consumer Sciences education or related occupations. * Leadership: An individual event, recognizes participants who actively evaluate and grow in their leadership potential. Participants use the Student Leadership Challenge and supporting materials, to investigate their leadership ability and develop a mentorship relationship to further their leadership development. |
| **Service Learning Projects** | Successful service learning project ideas originate from student concerns and needs. Allow students to brainstorm about service projects pertaining to the lesson. For additional information on service learning see:<http://www.nylc.org>   * Work with local middle school and implement a human services career day for middle school students. |

1. Visit the Texas College and Career Readiness Standards at <http://www.thecb.state.tx.us/collegereadiness/CRS.pdf>, Texas Higher Education Coordinating Board (THECB), 2009. [↑](#footnote-ref-1)