

CUSTOMER SERVICE TRAINING HANDBOOK



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CSR TRAINING SCENARIO: DELAYED DELIVERY — DE-ESCALATION & REMEDY

Scenario: *A customer is upset about a delayed product delivery and reaches out for support.*

- **Agent:** "Thank you for bringing this to my attention, Sarah. I completely understand how frustrating it is when your order doesn't arrive as expected, especially with no updates. Let me quickly review your order details so I can resolve this for you."
- **Customer:** "I really needed this order for today, and it's so disappointing that it didn't arrive on time."
- **Agent:** "I completely understand why you'd feel that way, Sarah, and I'm really sorry for the inconvenience. I just checked your tracking details, and your package is currently at your local courier hub. I've already contacted logistics, and they confirmed it's now scheduled for delivery tomorrow. To make up for the trouble, I've added a 10% discount to your next order, and I'll personally monitor your shipment until it arrives. Would you like me to send real-time tracking updates to your email, so you're always informed?"
- **Customer:** "Yes, I'd really appreciate that. Thank you."
- **Agent:** "Of course! I'll send you the tracking updates and follow up tomorrow to confirm your delivery. Thank you for your patience, Sarah. Is there anything else I can do for you today?"

Key Takeaways: *Empathize with the customer and acknowledge their frustration. Provide clear, actionable information about their order status. Offer a remedy (discount, monitoring, proactive follow-up). Ask if the customer would like additional updates or support.*



HEALTHCARE TRAINING SCENARIO: PRE-AUTHORIZATION — EXPECTATION SETTING

Scenario: *A patient needs clarification on the status of a pre-authorization request for a procedure or service.*

- **Agent:** "Thank you for your patience while I review your record. I see your doctor submitted the pre-authorization request yesterday, and it's currently pending approval. Typically, this process takes up to 48 hours. Let me set up a notification to track this for you and send you today's coverage breakdown."
- **Patient:** "I really hope this doesn't take too long. I'm worried about my appointment next week."
- **Agent:** "I completely understand your concern. I'll personally monitor the status of this request and notify you as soon as it's approved. Would you prefer to receive updates by text or by email?"
- **Patient:** "Text updates would be great, thanks."
- **Agent:** "Perfect, I'll set that up right now. You'll also receive a summary of your coverage details today. Is there anything else I can assist you with?"

Key Takeaways: *Reassure patients by confirming their request is in progress. Set realistic expectations for turnaround times. Proactively offer tracking and updates through their preferred communication method. Show empathy for their concerns and build trust by promising follow-up.*



TELCO TRAINING SCENARIO: SERVICE OUTAGE — FIRST-CALL RESOLUTION

Scenario: A customer is experiencing an internet service outage and urgently needs resolution.

- **Agent:** "I know getting you back online is critical, and I'm here to help. Let me run a quick diagnostic check."
- **Customer:** "I really need the internet for work right now; this is urgent."
- **Agent:** "I completely understand. I see the issue is with your router connectivity. Let's reset it together now—this often solves the problem. If that doesn't work, I'll book a technician for tomorrow morning at no extra cost. Can I confirm your availability?"
- **Customer:** "Tomorrow morning works. Let's try resetting it first."
- **Agent:** "Great! Let's walk through the reset steps. I'll stay on the line until we're sure you're back online or until I've booked your technician."

Key Takeaways: Act quickly and show urgency in resolving critical service issues. Run diagnostics and guide customers step-by-step. Offer a technician visit as a backup solution at no extra cost. Ensure the customer feels supported throughout the process



INSURANCE TRAINING SCENARIO: DENIED CLAIM — GUIDED RESUBMISSION

Scenario: A client has received a denial notice for their insurance claim and is upset.

- **Agent:** "I've reviewed your claim, and it was denied due to missing documentation. Let's fix that together today."
- **Customer:** "This is so frustrating. I submitted everything I had!"
- **Agent:** "I completely understand. Let me guide you step-by-step through uploading the missing files. Once resubmitted, I'll monitor it personally and keep you updated. Would you like me to email you a checklist to ensure nothing's missed?"
- **Customer:** "Yes, that would help a lot."
- **Agent:** "Great! I'll send it over right away and stay in touch as your claim is reprocessed."

Key Takeaways: Empathize with the client and reassure them the issue is fixable. Explain denial reasons clearly and provide actionable solutions. Offer checklists and hands-on support to avoid future issues. Show ownership by monitoring the resubmission process.



B2B TRAINING SCENARIO: OUTBOUND PROSPECTING — DEMO SET

Scenario: *You are reaching out to a potential client to book a software demo.*

- **Agent:** "Hi [Prospect's Name], this is Jennelyn from [Company]. I noticed your team is focused on streamlining operations. We help teams cut admin time by about 30%. Would you be open to a quick 15-minute demo next week to see if this aligns with your goals?"
- **Prospect:** "We're really busy this week."
- **Agent:** "I completely understand. How about I send over a short overview, and we book a time that works best for you next week? Even 15 minutes could save your team hours in the long run."
- **Prospect:** "Okay, send me the overview and I'll check my calendar."
- **Agent:** "Perfect, I'll send it right away and follow up with some time options."

Key Takeaways: *Keep the pitch short, relevant, and focused on solving pain points. Show flexibility when scheduling and offer valuable resources upfront. Stay persistent but polite; the goal is to secure a next step. Focus on relationship-building, not just the immediate sale.*

