

The Ultimate Guide to Training for Customer Service & Support

Written by Allie Decker

Turn your customer service team into a competitive advantage and engine for growth with these training ideas and tools.

As a shopper, what experiences with a company have stood out to you more – their marketing tactics, or their customer service? Most likely the latter.

Customer service is a company's opportunity to connect with customers, solve problems, and show they care. And when customer service is executed well, it can resonate with customers for years to come.

That's why training your customer support team is just as important (if not more) as training your marketing or sales teams. Service experiences are what stick with your customers and inspire reviews and word-of-mouth advertising.

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Customer support shouldn't be an afterthought. Happy customers come from excellent service and are your best advocates - even better than your most talented marketers.

That's why we've compiled this guide. By the end, you'll gain a complete understanding of how customer service training benefits your business, when different types of training might come in handy, and what materials you need to execute a thorough training program.

Keep reading or use the chapter links below to jump ahead.



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What is customer service training?

Customer service training is the coaching that employees receive with the goal of improving support and satisfaction among customers.

It's an iterative process that involves teaching skills, competencies, and tools needed to better serve customers so they derive more value from products and services.

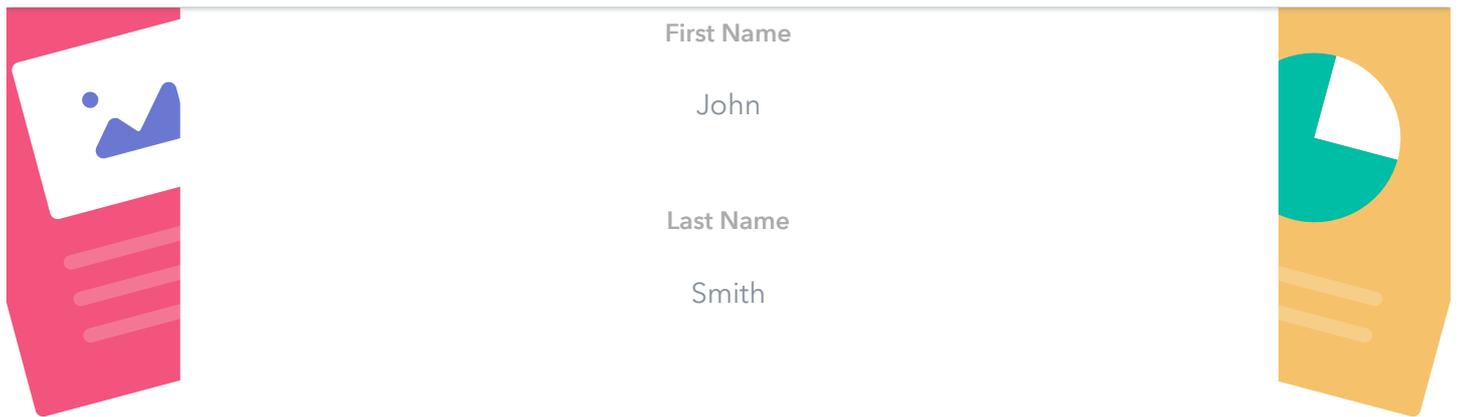
Any employee that interacts and deals with customers is eligible for customer service training. And given how your customers are your best growth opportunity, every employee should be working hard to keep them happy – whether from the position of a marketer, executive assistant, or customer service representative.

Nowadays, customer-facing teams are labeled many different things: **customer support**, **customer success**, or **customer service**. For the purpose of this article, I'm going to refer to customer service when discussing service and support training.

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Why is customer service training important?

It's not uncommon for businesses to view their customer service teams as an afterthought. Once a consumer becomes a customer and pays for your product or service, the hard work is done, right? Wrong ... oh, so wrong.

Remarkable customer service is a competitive advantage. It's also the key player in the game of **customer retention**.

Think about it. If a customer has a pressing question about your product and reaches out to your customer service team, what do you think would make them happy and willing to stick around? A generic email response, or a well-researched answer sent from a service representative dedicated to their success? Probably the latter.

Better yet, this customer might 1) be satisfied with their interaction with your company and customer service team and 2) go on to promote your business as one with great products and service. How great would that be?

Happy, delighted customers are your very best bet for bringing in new business, and because of this, customer service teams need to deliver beyond your customers' already high expectations.

That's why customer service training is so important. You're training your employees to deal with some of the most important people in your life – your customers. (Sorry, family.)

At this point, you might be asking, *Why can't I just hire the right people from the get-go and leave it at that?*

customers.

Regardless of how talented your new employees are, you should still conduct training that aligns everyone on how to work together and best represent your company.

Take HubSpot's content team, for example. We were hired because we know how to write, but when we started, we weren't simply handed a laptop and told, "Now, go type a bunch of stuff." No, we were trained on how to write per HubSpot's style guide, how to represent the company and brand online, and how to ensure all of our pieces meet quality standards.

The same goes for your customer support and service folks. Of course, you're going to hire highly-skilled people, but that doesn't mean they don't require training as a new hire and as part of a bigger team with a bigger goal – serving and delighting your customers.

Use free templates to help you engage and delight your customers.

Hiring for Customer Service

While training for customer service is the main topic here, I'm going to take a slight detour and discuss hiring for customer service, too. I'm doing this because hiring right is how you build a strong foundation for your **customer service team** – and how you ultimately ensure that your team is receptive to your training.

While some skills and strengths can be taught or fine-tuned through training, there are some that your team members must have upon hiring. No software, training exercises, or tools can compensate for gaps in this area.

Skills To Look for When Hiring for Customer Service

Here are some skills to look for – even if just a hint – while interviewing and screening **customer service candidates**.

1. Emotional Intelligence

Your customer service team is going to be dealing with a variety of customer problems, and probably some that they wouldn't *quite* deem problems themselves.

Being able to patiently listen, decipher someone else's problem, and empathize is at the heart of customer service. And unfortunately, this isn't a skill that comes naturally to everyone, nor is it something everyone can master in training. Ensure your customer service candidates display signs of emotional intelligence before bringing them on board.

2. Good Communication

If your candidates can't clearly answer an interview question, how do you think they'd communicate with your customers (who most likely have much higher expectations than you)?

Customer service training can teach new and improved communication techniques, but new hires should be able to showcase the ability to simplify complex topics and teach others new skills.

To gauge good communication skills, ask: *"How would you explain a complicated technical problem to a colleague with less technical understanding?"*

3. Resourcefulness

Resourcefulness is the difference between responding to a problem with "I don't know" and "I will find out." Problem-solving skills, initiative, and creativity are just a few competencies that align with resourcefulness.

While these skills can be cultivated through customer service training, your candidates should display some resourcefulness – or at least a willingness to figure things out.

To gauge resourcefulness, ask: *"Describe a time when you faced a significant obstacle to succeeding with an important work project or activity. What did you do to solve it?"*

4. Passion

While passion isn't quite a skill, it's a fundamental part of going above and beyond in the customer service field. Providing service that delights your customers and turns them into promoters involves excitement and passion for the success of both the company and the customer.

Your candidates might not have a particular passion for *your* company just yet, but they should display a passion for working with customers and helping others solve their problems.

To gauge passion, ask: *"When have you been most satisfied in your work at your previous company?"*

If hiring the right candidates is like planting seeds in the right soil, training your customer service team is like cultivating and growing your garden to its maximum potential.



Types of Customer Service Training

Customer service training can be applied to many different situations. While the idea is consistent across the board – train your team to serve and delight – specific training methods and practices will vary depending on the circumstance.

Let's break down a few instances where you might conduct customer service training and what you can expect as a hiring manager or owner.

1. New Hire Customer Service Training

As with any new role, the first month or two of training can dictate an employee's long-term success. Customer service training and onboarding for new hires aren't any different.

This specific type of training will help new employees acclimate to a new job, company, and culture and ensure they're ready to communicate with your valuable customers.

Here's what this type of customer service training entails:

Acquainting the team. To best serve your customers and handle a variety of problems and conflict, your customer service team needs to work together. Establish and maintain the agility of your team by introducing and involving new hires immediately.

Schedule a team lunch on their first day. Have team members give them an office tour. Make the first day or two all about getting to know each other and learning how to work together. This will make your employees much more comfortable in their new role.

Establishing expectations. New hires should know precisely what's expected of them during training and in their first month of work. Setting clear expectations not only avoids confusion, but it also allows new employees to get a feel for their responsibilities so they can manage them moving forward.

Consider writing out a training guide for your new hires that outlines what activities and plans to expect during training, what responsibilities they'll have during their first few months, and any internal resources (like reading material or colleagues they should meet with) they can use to get acclimated.

Setting up tools. Could we even do our jobs without our various tools and software and digital subscriptions? Probably not, and neither can your new employees. Before moving forward with training, set up your employees with the apps, tools, and memberships they need to **communicate and collaborate with the team**.



anyone. Set aside time for dedicated product training so that your new hires can learn your product so well they could teach others.

2. Quarterly or Yearly Customer Service Training

Whether your customer service team has been around for six months or six years, they should still undergo training every quarter, half-year, or year (depending on what works best for your company).

This training might look like a couple of different things:

Skills or competence check-in. Just as you'd conduct a routine performance review, a quarterly or half-year training is good practice for your customer service team. Skill-based training is ever-evolving, and certain skills can erode if not maintained over time. Conducting routine training keeps everyone on the team aligned, fresh, and doing their best

Team building. Working in customer service is tough, and it can take a toll on employees and their team relationships. Routine team-building activities and training can help keep those relationships sound and ensure all distractions are resolved so that your employees can focus on their jobs.

3. Emergency or Time-Sensitive Customer Service Training

Sometimes, customer service training can't be planned. Perhaps there's a product recall, a major rebranding, or a national advertising campaign.

Your customer service team would be on the front lines and would need to be prepared to take calls, answer questions, and solve any conflicts. Customer service training, in this case, would be all about equipping your team with everything they need to know to do their job.

Here's what urgent customer service training might consist of:

In times of crisis. In the event of a recall, crisis, or company emergency, your customer service team should be updated on all events and trained on how they can respond. Full transparency is encouraged here, given that your team will be dealing with the public's response first-hand. Make these trainings a priority on everyone's calendar and try to have your team trained all at once – this will keep everyone aligned.

Product or company updates. This type of customer service training is less of an emergency but just as time-sensitive. Whether you release a product update, run a major



For example, in the months leading up to HubSpot's annual **INBOUND** event, our customer service teams are sent new training materials. These resources give employees the most up-to-date information on any new products that'll be announced at INBOUND – which can be upwards of four or five major product releases! **Your customer service teams should be looped in on any company updates or changes.**

4. Customer Service Phone Training

Today, **48% of customers** want to communicate with companies via phone call for customer service. Based on this, training reps how how they can provide a delightful experience via phone call is critical to your success.

Here's what you should focus on in terms of phone training:

Maintaining a positive tone and attitude throughout the call

Remaining calm and professional, even on difficult calls

Speaking slowly and clearly

Asking customers clear and direct questions that help reps come to an effective solution efficiently

Presenting solutions in a way that will make sense for each individual customer

Using verbiage that's representative of your brand

Being an active listener

Always showing empathy

Staying in control of the conversation and leading the customer towards an effective resolution

Making sure customers don't have any other questions or concerns before hanging up

Thanking the customer at the end of the call

Being a customer service representative is tough work. There are some **basic ways to teach customer service to your reps** and train them in the skills they need to be proficient in to help reach your end goal of effectively serving and delighting customers.



Let's take a look.

Customer Service Basics & Soft Skills

1. Interpersonal Skills
2. Clear Communicator
3. Assertiveness and Directness
4. Product Feature and Application Knowledge
5. Crisis Management Skills
6. Team-Building and Camaraderie Skills
7. Customer Advocacy and Success Skills
8. Conflict Resolution Skills

Making your reps learn the following customer service basics and soft skills will make all the difference in your company's growth.

Your employees face customers every day. Customers will judge your business based on their interactions with your people and your reps' behavior. Only with thorough training in these areas can your customer service representatives deal with customer issues confidently and turn angry customers into satisfied ones.

Let's now dive into each of the customer service basics and soft skills your reps need to be successful in their roles.

1. Interpersonal Skills



Positivity

Positivity isn't just about smiling. It's also about keeping your language and responses upbeat and promising so customers also remain positive. Whether your team is serving customers via social media, email, chat, or the phone, train them to replace negative words with positive ones.

For example, instead of saying, "I'm afraid that...", encourage your customer service team to start sentences with, "I'd love to help...". This keeps the response in a positive light while remaining honest with customers.

Positivity Training Exercise

Jot down five to 10 negative customer service responses and ask your team to rewrite them as positive statements.

Empathy

Empathy is crucial to not only serving customers but genuinely wanting them to be happy and successful. Being able to walk in a customer's shoes and be just as invested in finding a solution to a problem can help your customer service team reach that resolution much quicker ... and make a customer for life.

But empathy doesn't come easily to everyone, especially more technical, logical people.

To develop empathy on your customer service team, encourage them to spend time with people who are different than them. Whether with someone at a community event, an Uber driver, or a stranger at a conference, a conversation outside their comfort zones can help diversify the way they think.

Empathy Training Exercise

Tell your team to think about a time *they* were a customer and might've had a frustrating transaction or unsatisfactory experience. Have them share their stories and recall how they felt and were treated.

2. Clear Communicator

Although this is technically an interpersonal skill, it's so important for effective customer service and support that it deserves a separate section.



Clarity is easy to decipher during interviews and onboarding, but it's still a skill that customer service representatives should hone throughout their careers, especially as new products or updates are introduced.

A great example of clarity in action is [Reddit's Explain Like I'm Five](#). On this thread, people take pretty complex topics, from biology to engineering to technology, and explain concepts as if they were teaching a child.

Now, "dumbing" answers down to this extent isn't necessary for your *very* adult audience, but it's a good example of explaining something in a clear and concise way.

Clear Communication Training Exercise

Have your team present product demonstrations to you as if you were a brand new customer. Challenge them to explain the product (or a portion of your product) in five minutes.

3. Assertiveness and Directness

Customer service reps need to be both assertive and direct. This will help reps maintain clear communication. It will also allow them to help customers more efficiently find and share the best solution for whatever issue it is the customer is facing.

Think about it this way – customers want quick and effective solutions to their challenges. They don't want to wait around for some wishy-washy solution that may or may not work.

By being assertive and direct, reps make customers feel confident in the information they're being fed.

Assertiveness and Directness Training Exercise

Encourage reps to try role-play exercises with each other where one person pretends to be an unhappy and vocal customer with a number of questions. The other person should practice regaining control of the conversation and respectfully but directly navigating the discussion to the solution or solutions that rep can offer.

4. Product Feature and Application Skills

Companies are always growing and evolving – from product updates to new branding, education on your company should be a continuous process, especially for your customer service team.



Product Feature and Application Training Exercises

Here are a few ideas for training on your product and company:

Assign a mentor: Organize for your employees to have a mentor, especially your new hires. The mentor should be someone in another department; this gives the employee exposure to different segments of business and allows them to stay up-to-date on company-wide happenings.

Coordinate job shadowing: This exercise is highly encouraged for new hires but can also benefit customer service veterans. Shadowing introduces your team to new approaches, responses, and applications of customer service and your product that they'd otherwise not be exposed to.

Hold demonstration sessions: This is similar to the training idea mentioned above, but it involves having your team present to their own teammates. This will challenge them on their communication and understanding of the product. Encourage attendees to provide constructive feedback.

Create a knowledge base: They say teaching others is the best way to learn, and the same rings true for customer service. Have your team create a **knowledge base** of your product or service offering, in the form of a guide or directory. This will not only challenge your team on their knowledge and clarity but ultimately, help customers by creating a lasting company resource.

[Learn how to set up your knowledge base of articles in HubSpot's Service Hub.](#)

5. Crisis Management Skills

Research shows that **70% of unhappy customers** whose problems are resolved are willing to shop with a business again. Just because a customer comes to you unhappy, angry, or rude doesn't mean they have to walk away with the same sentiment.

Appropriately managing each customer's crisis and actively working to change their attitude is how you both serve and retain customers in the long run.

[Discover how to manage, plan for, and communicate during crises with these management plan templates.](#)

Crisis Management Training Exercises



team how to deal with – and delight – difficult customers.

Conduct role-play activities: This training exercise is highly recommended for all customer service representatives and can be especially helpful for pacifying angry customers.

Conducting mock calls that resemble a real customer service issue (and involve a seemingly angry caller) can help acclimate your team to the realities of upset customers. Have your team work together and encourage veterans on your team to use real situations they've dealt with in the past.

Teach the LAST method: Despite intensive training on skills like empathy and patience, some difficult customers will simply be impossible to relate to. That's where methods like reflective listening and LAST come into play. LAST stands for Listen, Acknowledge, Solve, and Thank. Teach your team to pause, listen to, and acknowledge upset customers – these steps can make the difference between solving an angry customer's problem and turning an angry customer into a satisfied one.

6. Team-Building and Camaraderie Skills

Camaraderie and community among professional teams in any industry can help with overall performance, but it's especially important in customer service. I included this section in my list of customer service training ideas because that's essentially what is it: Training your team to take care of themselves so they can take care of your customers.

Team-Building and Camaraderie Training Exercises

Here are a few ways to train your team to cultivate community and take care of themselves:

Encourage meditation: Dealing with customers all day, every day can be incredibly draining and stressful. Meditation can be a helpful tool to regain mental balance and relaxation in the midst of customer service chaos. Dedicate time to learning meditation and relaxation methods so your team feels comfortable taking a break. Apps like [Headspace](#) and [Calm](#) can help your team, especially if they meditate together.

Inspire healthy competition: Customer service training isn't just about teaching your team how to do their job; it's also about encouraging them to reach their full potential. Inspiring healthy competition in the form of a leaderboard or monthly awards will challenge your customer service team to go above and beyond, helping more customers, creating camaraderie, and contributing to their overall success and future career.



Take team outings (in-person or digitally): Traditional product and skill training can bring your team together at work, but out-of-office activities can also inspire community and friendship that further encourage camaraderie in the office.

Treat your team to an **event or activity** unrelated to work, such as a museum trip or a **remote team-building** game. Not only are these activities fun and casual, but they also create lasting connections that can mitigate otherwise tough days at work.

7. Customer Advocacy and Success Skills

To create an atmosphere of customer advocacy and success, your training has to go above and beyond teaching soft and technical skills.

I'm talking about turning support into customer championing. Turning satisfaction into retention. Turning happy customers into customers who actively promote your company. These customers don't simply exist once they make a purchase from you; they're created when your *customer service team* treats them well and fights to solve their problems.

Customer Advocacy and Success Training Exercises

Here are a few training ideas to build a culture of world-class customer service:

Teach new language: I referenced positive language in a previous section, but this is a little different. The key to customer advocacy is aligning your goals and needs with the customer and essentially "joining their team" as you work towards a solution. This can be done with a simple switch in verbiage.

Encourage exceeding expectations: Let's say your team is required to solve a minimum of 10 tickets per day. You could train your employees to get that done and leave them alone. I mean, they *are* doing their work, right?

Sure, but this hardly creates an environment of going above and beyond for the customer (not to mention each employee's potential). Instead of settling with "good enough," challenge your team to do the best they can do, every day. This motivation will not only change how much work is done but will also influence how they work with and satisfy customers.

Collect (and use) feedback: **Feedback** is the lifeblood of any team or company that truly wants to improve. Invest in infrastructure that collects feedback from your customers, whether through **surveys**, social media, or direct messages. Use that feedback to measure



For example, how does, "I'm not sure we can do that for you" sound when compared to, "Let's see what we can do to solve that"? How about: "Let's get you set up with the right person to help" versus "I can't help with that"? Changing responses to align with a customer's frustrations and needs tells a customer, "We're on your side, too."

8. Conflict Resolution Skills

Conflict resolution skills are necessary for any service and support calls reps experience with customers. After all, customers who are reaching out to your service and support reps are doing so because they're trying to find a solution to a challenge or roadblock.

Not to mention, reps are bound to encounter angry frustrated customers from time to time, too – this requires an even deeper level of conflict resolution on the part of reps.

Conflict Resolution Training Exercises

There are a number of **conflict resolution tips** that you can teach reps to deploy in certain situations. Here are **some examples**:

Draw on past experiences to set expectations.

Communicate clearly.

Show empathy.

Use active listening.

Acknowledge the people's specific needs.

Don't point fingers or place the blame on anyone.

Use "I" statements.

Say you're sorry.

Stay calm and professional.

Help people how they want to be helped.

Don't interrupt.

Remember the importance of maintaining the relationship.



online. We've gathered some of our favorites below.

[Learn everything you need to know to get started with the HubSpot Service Hub.](#)

1. Customer Service Training Manual [[Download for Free](#)]

Aligning your team with universal training documentation is an assured way to inform new hires of their roles, goals, and expectations. You can use [this free customer support training manual template](#) to start building a customizable manual for your business.

2. Customer Service Training Courses

Online training courses that teach vital customer service skills can be a great addition to your training program. As self-led seminars, employees take ownership of their training and are exposed to skills and competencies outside the organization.

Below is a short list of some free [customer service training courses](#) for your team.

Customer Service Training by [Alison](#)

Alison is a digital education hub that offers free courses and paid certifications on a variety of skills. Its [Customer Service Training](#) course is geared towards beginners in the field so it's a perfect place to start.

This course will give your employees an understanding of essential customer service factors and help them understand how to deliver a customer-friendly approach that's best for your business needs. They'll also learn the benefits of providing excellent service and cover a few do's and don'ts when dealing with customers.

Culture of Services: New Perspective on Customer Relations by [edX](#)

Like Alison, edX is another digital learning platform offering free courses. They partner with universities around the world, such as Berkeley, Harvard, and University of Kyoto – the school by which the [Culture of Services: New Perspective on Customer Relations](#) course is presented.

This course focuses on the social and cultural aspects of customer service and takes nine to 11 weeks to complete. Throughout the course, your employees will be exposed to a wide variety of services – such as sushi bars, restaurants, hotels, and apparel. They'll study the, "... nuanced and paradoxical nature" of customer service and learn how to approach it from a cultural and social perspective.



Lynda.com is an award-winning online education platform run by LinkedIn. It primarily teaches digital and business-related skills.

The [Innovative Customer Service Techniques](#) course is created and presented by customer service expert Jeff Toister and is comprised of a short 45-minute video. Your employees can access the course through a seven-day free trial or join Lynda's paid membership.

Bonus: Business Courses by [Treehouse](#)

Treehouse is another online course library, but the program requires a paid membership. HubSpot uses Treehouse for our own customer support and service training. Treehouse offers [courses on soft skills](#) and others that may contribute to overall customer service education.

3. Customer Service Training Games

Using games and activities can make customer training much more fun. Whether they require materials like a whiteboard or simply involve your team, games are a way to teach valuable skills while encouraging teamwork and collaboration between your employees.

Check out these free, quick and easy games to play during customer support and service training:

[6 Fun and Powerful Training Games for Customer Service Teams](#) by UserLike

[5 Free Customer Service Training Games](#) by BusinessTrainingWorks

4. Customer Service Training Videos

Sometimes it's valuable to incorporate outside insight or perspective during customer service training, and videos from thought leaders and industry experts do just that.

Here's an example of a well-made, valuable customer service training video. Also, [check out this post for 19 more videos](#).

Customer Service Training Video Example

What is customer service ? The 7 Essentials To Ex...

In this 12-minute video, business coach and consultant [David Brownlee](#) explains the essentials of customer service in a friendly, easy-to-understand way. With over 4,000 likes, the value of this video speaks for itself.

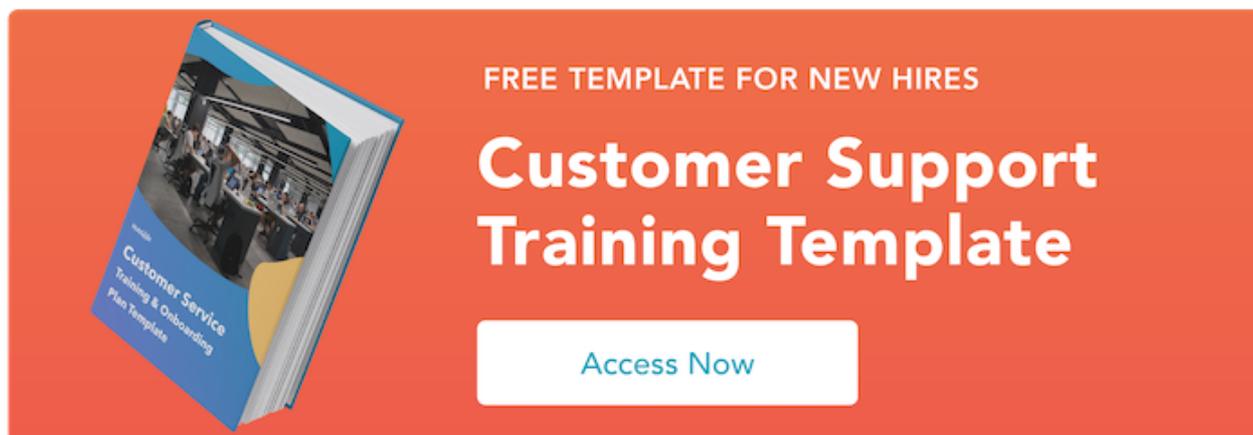
Brownlee is an expert in the customer service field and advocates for creating relationships of trust and loyalty with customers, promoting customer care versus simple service.

Grow Better With Customer Service & Support Training

Consumers view customer service as the test of how much a company truly values them. That means roughly three out of every four customers view their interactions with customer service as more important than marketing or sales – that’s why customer service is such an important engine for growth.

With your customer service team on the front lines of customer service and retention, they need to be properly trained and equipped to handle any challenge that comes their way. Execute these customer service and support training ideas, and you’ll find your customers *and* employees more satisfied overall.

Editor's note: This post was originally published in July 2018 and has been updated for comprehensiveness.



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Originally published Nov 5, 2021 5:25:00 PM, updated November 06, 2021

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