

Phase I - Module 3

Table of Contents

Keyboarding – Assessment	1
Customer Service	2
What Is Customer Service?	2
Importance of Customer Service	3
Game: SPENT	3
Interviewing Clients	4
Guided & Effective Interview	5
The Purpose of an Effective Interview	5
Client Interaction	6
Techniques for Effective Questioning	6
Advantages Open-Ended Questions	6
Examples of Open-Ended Questions?	6
Advantages of Closed-Ended Questions	7
Examples of Closed-Ended Questions?	7
When Should I Conduct an Interview?	7
Adding Documents/Uploads/Documentation	7
Soft Skills	8
Important Caseworker Skills:	8
Who is responsible for what?	11
Organization in the Workplace	12
Teamwork	13
Conflict Resolution	13
Cited Sources	14

Keyboarding – Assessment

The following assessment should be administered to the students utilizing one of the following websites:

- <http://www.learntotype.com>
- <http://www.gcflearnfree.org/typing/typing/1/>
- <http://www.freotypinggame.net>

Students should be able to type at least 25 WPM, with minimum errors in a 5-minuted timed test.

Customer Service

The goal of customer service is to meet customer needs and desires, and to exceed their expectations. It can also help to improve brand credibility and build relationships with customers.

Customer service is all around us. Most of us engage in customer service activities of some type during our normal daily routines at work. All of us encounter customer service when we go to the store, call a company on the phone, or visit a business's web site. However, simply being exposed to customer service does not mean you understand how to do it well or how to evaluate whether you are receiving an acceptable level of customer service. The point of this course is to help you understand what customer service is and how to make it better whether you do it for a living or deal with it at a consumer level.

For some it can be difficult to think about customer service in terms of the work that we do. But, although we are providing services through federal and state programs, customer service is a huge component.

What Is Customer Service?

Customer service is the support and assistance a business provides to customers before, during, and after they purchase a product or service. It can include a wide range of activities, such as:

- Answering questions
- Finding solutions
- Resolving complaints
- Interacting with customers
- Responding quickly to inquiries and issues
- Acting on customer feedback and suggestions
- Showing empathy and understanding
- Providing self-service options
- Emphasizing omnichannel support

Some qualities of good customer service include:

- Problem-solving skills
- Clear communication

- Friendly attitude
- Empathy
- Business acumen
- Product and service knowledge
- Strong time management

Importance of Customer Service

- Customer retention: Good customer service is a key factor in retaining customers and encouraging repeat business. Without our customers there would be no need for the programs we administer.
- Word of mouth: Excellent customer service can be a powerful part of word-of-mouth marketing. When customers feel welcomed and understood, they are more likely to refer your business to friends and family. When you encounter a good waiter/server, every time you go into that particular restaurant you will look for them and want to sit in their section. Why? It was the way they made you feel.
- Employee retention: Good customer service can also help boost employee retention and morale. When employees feel like they are doing an excellent job, and their job matters it makes a positive difference.
- Company values: Customer service can help reinforce a company's values and brand.

The PDF provided in this module will assist in further explaining customer service. Career and Employment Prep have provided this information – 2017. Job Skills Activities: Customer Service Skills Activities.

Activity: To delve deeper into customer service and potential triggers, have students complete the Myers-Briggs assessment using the following website:
<https://www.16personalities.com>. This activity can be done either in class or outside of class.

Game: SPENT

Urban Ministries of Durham serves over 6,000 people every year. But you would never need help, right? This game should help students understand the lives of the families we serve and understand their daily struggles.

Take time to play the game with the students.

<https://playspent.org/>

Interviewing Clients

Caseworkers/Social Workers interview clients to learn about them and build relationships. Effective interviewing skills can help clients feel comfortable and open up. Here are some tips for interviewing clients:

- Set the purpose: Clearly explain the purpose of the meeting and how the client can participate.
- Discuss policy and ethics: Discuss any relevant legal, policy, or ethical factors as part of the informed consent process.
- Ask questions: Ask open-ended questions that cannot be answered with a simple "yes" or "no".
- Listen actively: Show that you are listening to the client's needs and concerns.
- Be empathetic: Try to relate to the client's experience, which can help them feel validated and more likely to participate.
- Be aware of nonverbal cues: Maintain eye contact, smile, sit up straight, and stay calm to show that you are engaged.
- Make the space comfortable: Ensure the client feels safe and comfortable.

The following excerpt is taken from section 400 of the Food and Nutrition Services Policy Manual regarding interviewing clients:

APPLICATION INTERVIEW REQUIREMENTS

- A. All applicant households, including those submitting applications by mail, email, or drop off must have an interview prior to the issuance of Food and Nutrition Services (FNS) benefits.
- B. The interview may be conducted in-person, by telephone, or video conference.
- C. The interview can be conducted in an FNS office or other mutually acceptable location, including a household's residence.
- D. An in-person interview must be provided if requested by the applicant or authorized representative.
- E. An in-person interview must not be required if it would be a hardship for the household.
- F. The interview must be conducted by a qualified eligibility worker and be held prior to initial certification.

- G. The individual interviewed may be the head of household, spouse, any other adult member of the household, or an authorized representative as outlined in FNS 175 Authorized Representative.
- H. If there is no adult in the household, an emancipated minor can complete the application interview.
- I. The applicant may include any person they choose to in the interview.

RESPONSIBILITIES OF THE INTERVIEWER

The interviewer has several responsibilities during the interview process. Those responsibilities include the following:

- A. Advise households of their rights and responsibilities.
- B. Explain the appropriate application processing time standards.
- C. Inform households of their responsibility to report changes.
- D. Advise households that are also applying for or receiving Work First and/or Supplemental Security Income (SSI) benefits that time limits and other requirements that apply to the receipt of Work First and/or SSI benefits do not apply to the receipt of FNS.
- E. Advise households that the termination of Work First and/or SSI due to time limits, employment, or for other reasons, does not affect FNS eligibility.
- F. Explain the Lifeline and Link-Up Assistance Programs to the applicant. Refer to FNS 155 Lifeline/Link-Up Assistance Programs.
- G. Conduct the interview as an official and confidential discussion of household circumstances. Do not simply review the information that appears on the application form but explore and resolve any unclear and incomplete information.
- H. Protect the applicant's right to privacy during the interview. Hold the interview in a location that ensures privacy and confidentiality during the interview process.
- I. Document the date of interview in North Carolina Families Accessing Services through Technology (NC FAST) per instructions in NC FAST Help.
- J. Provide all households with the DSS-8227 Immigrant Access Notice and the DSS-8650A Documents Needed to Complete Your Application.

Guided & Effective Interview

The Purpose of an Effective Interview

- One of the primary and key duties of an eligibility worker is to interview clients.
- Interviewing provides the opportunity for both the worker and the client to seek and give information.
- While most interviews occur at the time of application and recertification, anytime you and your client communicate, you are conducting an interview.

- Interviewing gives applicants the opportunity to gain an understanding of the agency, programs, benefits, and the requirements they must meet to satisfy program guidelines.
- It also provides an opportunity to educate clients about other services and agencies that may offer programs and services they need.
- An interview gives the client an opportunity to present information in their own words which may give you a better understanding of their situation.
- By completing an effective interview, you will secure the information necessary in order to determine eligibility and it gives the client a clear understanding of their rights and responsibilities.

Client Interaction

- Three of the most important traits for you to be a successful interviewer are empathy, communication, and professionalism.
- It is important to remember that clients are being asked personal questions followed by requests for verification of confidential information that they don't even discuss with close friends and family.
- Being sensitive to that and being tactful in how you interact is vital for easing the client's concerns.

Key Points to remember while interacting with clients:

- People react differently to personal questions being asked of them.
- Recognize and eliminate barriers that may surface because of age, gender, language, and racial differences.
- People who are elderly, disabled, or have learning disabilities may require more of your time and assistance.
- Attitudes towards authority can in fact influence a client's interaction with you.
- You do not have to put up with abuse, such as bad language, physical threats, violence etc.

Techniques for Effective Questioning

Advantages Open-Ended Questions

- Encourages more client participation.
- Provides a more complete explanation of answers.
- Gather more information.
- Disadvantages of Open-Ended Questions.
- Allows the client to ramble.
- Takes more time.
- May result in some unnecessary, irrelevant disclosure of information.

Examples of Open-Ended Questions?

- Tell me about your situation.

- Tell me about the work that you do?
 - Tell me about the money you received last month?
 - Tell me how you paid the rent?
 - Tell me about who lives in your home?
- Remember, asking leading questions is extremely important!

Advantages of Closed-Ended Questions

- Shortens the interview time.
- Disadvantages of closed ended questions
- Allows for minimal client participation.
- Eliminates explanations and in turn, information.
- May appear to be an interrogation.

Examples of Closed-Ended Questions?

- What type of bank accounts do you have?
- How many hours do you work?
- How many people live with you?

When Should I Conduct an Interview?

- Every Application
- Every Recertification
- Any time information is questionable.
- In-person visits
- When client requests an interview (whether in person or by phone)

Adding Documents/Uploads/Documentation

Documentation is materials that provide official information or evidence or that services as a record. If it is not documented, it did not happen. Therefore, it is important that everything we record has information to back it up.

Caseworkers are able to upload documents for all case types within NC FAST.

Counties must have software to scan and save documents prior to uploading it into the NC FAST environment/system.

NOTE: You may have to upload documents prior to class in order to show an example in the community college environment/system.

Any document transmitted **MUST** be pertinent to an active case within the environment/system.

Related job aid:

Uploading Documents into NC FAST

ePASS Document Upload

Attach and Detach in NC FAST

Attaching Files

Soft Skills

Soft skills are intangible attributes, personality traits and behaviors that will help candidates obtain employment and succeed in their work. Unlike technical or hard skills, soft skills are interpersonal and behavioral skills that help you to collaborate well with other people and develop your career.

Important Caseworker Skills:

The acronym CUP(P)CAKES will help you to hon in on these skills more effectively.

Clear Communication

Unaframed to Clarify

Patience & **P**ositive Language

Calming Presence

Attentiveness

Keeping Promises

Etiquette

Specific Product

Communication



Communication is a part of everyday life, whether we communicate in person or on the countless digital platforms available to us. But how much of our communication actually reaches the intended audience or person the way we hoped? Effective communication requires us to be clear and complete in what we are trying to express.

Being an effective communicator in our professional and personal lives involves learning the skills to exchange information with clarity, empathy, and understanding. In this article, we'll define what effective communication looks like, discuss its benefits, and offer ways to improve your communication skills.

Effective communication is the process of exchanging ideas, thoughts, opinions, knowledge, and data so that the message was received and understood with clarity and purpose. When we communicate effectively, both the sender and receiver feel satisfied.

For communication to be effective, it must be **clear, correct, complete, concise,** and **compassionate** or also known as the 5 Cs of communication.

6 Tips for Effective Communication:

Relay clearly, keep it simple and leave nothing to doubt.

- | | |
|---|--|
| 1 | • Be conscious of your emotions as they will show through |
| 2 | • Vary your voice, tone, and pitch |
| 3 | • If you want people to accept your ideas share them with enthusiasm |
| 4 | • Be aware of your gestures and the impact that they have |
| 5 | • Remember the old saying, "look them in the eye" |
| 6 | • Study the gestures of others and listen to their tone |

A notable example of not having effective communication with our customers is using DSS lingo that we would use with our coworkers. We should not use DSS lingo with our customers:

Example:

What we would say:

"Here is a DSS-8650 and in 10 days I will mail you another DSS 8650 and if you do not respond you will receive a DSS-8551 when I deny your app."

Instead say:

"Here is a Request of Information for all of the items we need to complete your application. If we do not receive these verifications in 10 days, we will send a letter to remind you of what we need. Please be aware that those will be the only requests you will receive. If you do not provide the information within the 30-day processing period, we will have to deny the application. After 30 days, you will receive a notice of denial in the mail."

Unafraid to Clarify

Clarification can open up new questions. Keep it professional and objective.

- Clarify any information given to you.
- Listen for inconsistencies and clear them up.
- It is our responsibility to ask questions if we find the information we are given, "questionable."
- If what you are being told doesn't make sense, don't be afraid to clarify.

- Do NOT omit/censor information given by an applicant/customer. Record the information as is.
NOTE: Your job is to determine eligibility based on facts and policy. We are not here to “make” someone eligible or to “prevent” someone from receiving benefits.

Patience

“GREAT” service beats “fast” service every time.

- Make sure that you understand the client.
- Take time to listen to the client.
- Ensure that you explain the process and that you explain the timeframes to your client.

Positive Language

Making minor changes in your conversational patterns can go along way to creating happier relationships with clients.

The language you use around getting their benefits is crucial.

Negative - “Your FNS card won’t be here for 7-10 days.

Positive – “Your card should arrive in 7-10 days; let’s check your mailing address to avoid any delays in getting that to you. Here is a current list of food banks to help out while it’s on its way.”

Remember words have power!!!

Calming Presence

The best human service professionals do not let a heated client force them to lose their cool; in fact, it is our job to maintain a calming presence for a client whose current circumstance has them nervous or frustrated.

- Speak in an even tone.
- Assure that you want to help them.

Attentiveness

What are our clients really telling us?

- Smile when you greet them.
- Do not keep looking at the time or typing while they talk. Stay engaged.
- Read their body language for emotional clues.
- Be aware of your own body language and tone.
- Listen for language/terms they use to describe their needs. They will not know DSS lingo.

- Be an active listener, lean forward, make eye contact, nod your head when you understand.
- Acknowledge the person, not the just the “client.”

Keeping Promises

Keeping promises that you make is essential in building our client’s trust.

- Keeping your promises goes a long way in showing the clients that you’re serious about their needs.
- Touch base with them, because in their eyes, when *you don’t call* = *you don’t care*.

Etiquette

Phone etiquette is all about:

- Body language – SMILE!!! Even though they can’t see you, they can hear it. Smiling can change the way you speak.
- Tone of Voice – Use an even tone and enunciate your greeting clearly and openly.
- Transferring – Ensure that you send them to the applicable person they’re trying to reach and that they are available to take the call, OR let the caller know they need to leave a message. Assure them their call will be returned timely.

Specific Product

Without knowing the services, we offer front-to-back, you won’t know how to help our clients.

- Once you get into your various roles develop detailed policy knowledge. Have NC FAST system knowledge. Both are essential to serving your clients and approving benefits timely.
- Imagine if your family were experiencing a crisis, you would want to talk to someone who knows how to fix the problem.

Now, let us pivot slightly into talking about Applicant and Caseworker Responsibility.

Who is responsible for what?

Applicant Responsibilities:

- Give truthful and complete information.
- Must provide proof of identity and citizenship status.
- Provide required verifications.
- Report changes to the agency.

Caseworker Responsibilities:

- Advise households of their rights and responsibilities.
- Inform households of their responsibility to report changes.
- Explain the appropriate application processing time standards.
- Explore and resolve any unclear and incomplete information.
- Conduct the interview as an official and confidential discussion of household circumstances. Do not simply review the evidence that appears on the application form.

Organization in the Workplace



1. **Time block your days** can help you focus on your tasks.
2. **Establish a routine**, you're more likely to form habits that give you structure and make each day go more smoothly.
3. **Adhere to your schedule** and your routine the best you can.
4. **Use your email calendar** to set up alerts for meetings that can help you remain organized and prepare for them ahead of time.
5. **Write things down** to help you remember important information.
6. **Make a color-coded to-do list**, it's much easier to glance at your to-do-list and understand what you need to do.
7. **Develop checklists and templates** to help you streamline and standardize your work processes.
8. **Create a filing system**, physical or digital will help you reduce clutter to remain organized.
9. **Clean up regularly** to help you stay motivated, focused and productive.
10. **Get desk organizers**, put like items together to maximize space.
11. **Avoid multitasking** to focus your efforts on completing one project or task at a time.
12. **Take regular breaks** at the appropriate times can help you remain focus and minimize distractions.
13. **Set aside specific time for emails** so that you can respond to priority messages and star any emails that you can get to later.
14. **Use the right tools** to make sure you can do your job more efficiently and effectively.

Teamwork

Take this time to do a quick teambuilding exercise. Break out into groups to show the value of teamwork.

Examples:

- The Desert Survival Team Building Exercise
- Emergency Evacuation Drill
- Group Shelter Building
- Airplane Crash Survival Simulation

Conflict Resolution

Handling conflict in any context is never fun. Oftentimes, issues become more complicated than they need if the people involved need more conflict resolution and general communication skills.

Why are conflict resolution skills important?

Conflict is a part of life. It is a natural and oftentimes healthy occurrence brought about by differences. You may experience conflict with friends, family, or coworkers, and you might need to be able to defuse the situation productively. Conflict resolution skills exist to help you do just that. Practicing open communication by utilizing active listening and patience can bring about peaceful resolutions that foster safe work and home environments.

Examples of Skills

- Actively listen.
- Compromise.
- Manage your stress.
- Be patient.
- Be empathetic.
- Self-reflect.

In the workplace

Conflict: An employee approaches you, their manager, complaining that another employee is being too loud and disruptive while doing their work. They tell you they cannot focus and expect you to do something to resolve this issue.

Solution: Express your understanding of that employee's issue and let them know their side of the story has been heard. Then, speak to the other employees involved, asking them about the situation. Politely and calmly explain that others have complained about disruptions in the workplace environment. Kindly ask them to conduct their work in a less disruptive manner. If it continues to be an issue, you'll have to take further action, which could involve memos or even human resources (HR).

Skills used: Open communication, active listening, patience.

Cited Sources

Career and Employment Prep – 2017. Job Skills Activities: Customer Service Skills Activities.

Urban Ministries of Durham – Game: SPENT

NCDHHS, Food and Nutrition Policy, Section 400

NCDHHS | Division of Social Services | April 2024 In-Person Regional Meeting | Effective Interviewing

Buncombe County DSS Training Curriculum

Coursera - [What Is Effective Communication? Skills for Work, School, and Life | Coursera](#)

Indeed - [28 Tips on How To Be Organized in the Workplace | Indeed.com](#)

Coursera - [Conflict Resolution Skills: What They Are and How to Use Them | Coursera](#)