



CSR Training Resources

Never think you have to invent the wheel. There are many great training resources available to utilize for your CSRs. Set up an organized plan for utilizing any of the below resources, and keep in mind that you can't expect employees to learn on their own time. In my practice, I had a notebook for each employee to record the modules they had taken. I scheduled 30 minutes a couple of times a week for them to go to the office and learn.

Make a plan, schedule time, buy the books or courses, and pay them for learning, even if you read a chapter a week together at lunch and discuss the lessons. It is to your great benefit to do so. Having a well-trained team is like driving a well-tuned race car. Just turn them loose, and watch how far and how fast you will go.

Online Programs

Wendy Myers Communication Solutions (csvets.com):

Wendy has been focused on CSR training for a multitude of years and has both free and paid training modules available on her website.

Ignite Training CSR Community (ignitevet.com): Ignite offers training and social support for all areas of practice, but their CSR training comes with a community where CSR team members can reach out for help or mentorship and share stories of their challenges in addition to excellent skills development and communication training.

Communication Workshops—Debbie Boone (conference.iceu.com): These three one-hour online workshops focus on basic communication skills, management of emotions through self-regulation, and dealing with conflict, including communicating with highly reactive people.

ACT Client Services Certificate Program (stafftraining.4act.com/client-service): In addition to their tradition CSR training, ACT has partnered with VHMA to create a certificate program for CSRs. This is a self-paced course.

Books

Nancy Friedman's books: Nancy is a great storyteller, and she makes the lessons stick on how to serve a client.

Crucial Conversations: Tools for Talking When Stakes Are High by Kerry Patterson, Joseph Grenny, Ron McMillan, and Al Switzler: This book is my bible of communication. I recommend it more than any other book I have read. Every person in the practice should read this book and practice these skills.

If Disney Ran Your Hospital: 9½ Things You Would Do Differently by Fred Lee: I highly recommend this book for management and CSRs. Sharing a Disney-like experience with your clients can lead to raving fans. We are on stage at all times.

The Fred Factor: Every Person's Guide to Making the Ordinary Extraordinary! by Mark Sanborn: This book describes how the right attitude can change the most mundane job into something spectacular.