

# KACC-0247 HVAC Customer Soft Skills Blueprint

## Author

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## Competencies and Learning Objectives

1. Demonstrate professionalism through nonverbal behavior while working with customers and coworkers.
  - Demonstrate a positive first impression.
  - Proactively solve problems with a positive attitude.
  - Use professional, courteous behavior when addressing and responding to difficult customers.
  - Strategically plan how to problem solve customer's complaints.
  - Demonstrate the importance of teamwork, business etiquette and manners.
2. Use professional, courteous communication when interacting with customers.
  - Communicate clearly, honestly, and accurately with customers.
  - Exhibit active listening skills and comprehension of what the customer is saying.
  - Use conflict-resolution skills to resolve customer concerns.
3. Demonstrate professional communication strategies when interacting with customers.
  - Use professional tone of voice and demeanor when communicating with customers by phone or voice mail.
  - Use appropriate word choice and phrasing when serving customers.
  - Explain professional mobile device usage.
  - Demonstrate communication strategies that build the customer/company relationship.

## Orientation to Course

### Course Description

Prepares the student for the skills of handling customers, coworkers and others in a positive and productive manner. Students will be prepared in the areas of professionalism and nonverbal behavior, communication, and communication strategies.

### Competencies

Upon completion of the course, you will be rated as MC (Mastered Competency) or NM (Not-Mastered Competency) based on your demonstrated ability of the course's established competencies. You will:

- Demonstrate professionalism through nonverbal behavior while working with customers and coworkers.
- Use professional, courteous communication when interacting with customers.
- Demonstrate professional communication strategies when interacting with customers.

## Assessment

You will be given a written progress exam and a role-playing exercise to see if you are on track in progressing toward the required competencies at the end of each module. You must pass these progress exams with a score of at least 80% before you can move on to the next module.

At the end of the course you will again be given a final written exam and some role-playing exercises. You must pass with at least a score of 80% before you will be rated with an MC as your grade for the course.

## Course work

Most of this course can be worked on online, you only need to come into the lab to take your written exams and perform your role-playing exercises at the end of each module and for the course final.

## Role Play Exercises

You will need to come to class having practiced and ready to perform your role-playing exercise and take your written exams.

**Syllabus and Textbook** *(Note: Books and materials required for this course are listed below. Instructor uses instructional materials from this publisher, including presentations, videos, and other learning materials.)*

Read the syllabus to understand the expectations for this course.

The textbook for this course is the HVAC Customer Service Handbook 4th Edition, ISBN 978-0-9897540-8-8.

Before we begin I want you to meet the author of the HVAC Customer Service Handbook that you will be using in this course. Mr. Steve Coscia will explain the need for good customer service.

**Course Navigation** *(Note: Instructions for learning management system)*

In the left navigation bar is a Course Tools menu. It provides information about what tools you need for the course, and how to navigate in Canvas. Start the course with the first module below. You can also click on the **Modules** link in the left navigation bar to navigate through the course.

# Modules

## Module 1: Professionalism and Nonverbal Behavior

### Professionalism and Nonverbal Behavior Overview

Being a very skilled and productive worker is great, but you need more. You need to also have great customer service soft skills. This course will help you develop the required customer soft skills you will need to succeed. In this module you will explore why it is so important to create a positive first impression. You will see why having a positive attitude will help with proactive problem solving. You will learn how to create strategic plans when dealing with difficult customers and the importance of teamwork. Remember that having great customer service skills is just as important if not more important than technical skills. Many HVAC companies would hire a person with good customer service skills and minimal technical skills over someone with great technical skills and poor customer service skills.

When you have completed this module, you will know how to:

- Demonstrate a positive first impression.
- Proactively solve problems with a positive attitude.
- Use professional, courteous behavior when addressing and responding to difficult customers.
- Strategically plan how to problem solve customer's complaints.
- Demonstrate the importance of teamwork, business etiquette and manners.

### Professionalism and Nonverbal Behavior Assignments

While working on this module, pay attention to the four stories that show how the HVAC personnel worked together, took a second to think before they acted, and planned so they could contain problems and be ready for the unexpected. Also pay close attention on how to create a positive first impression. Make sure you understand the Contain, Qualify and Correct flowchart found on page 18 in the first chapter of the handbook.

1. Read the introduction and chapter 1 Practical Service Ideas in the *HVAC Customer Service Handbook*, pp. 9-40.
2. View the video presentation for chapter 1 following along with the handbook.
3. Complete the Professionalism and Nonverbal Behavior YouTube assignment.
4. Practice the role-playing exercise with someone you know.
5. Come to class ready to take the Written Progress Exam and perform your role-playing exercise. Make sure you have practiced the role play before coming to class.

### Module 1 YouTube Assignment: Professionalism

1. Go online to YouTube and find three to four customer service videos that discuss Professionalism and/or Nonverbal Behavior in regards to customer service. They can be good or bad examples.

2. Print off and fill out the YouTube video worksheet on the video and explain how it supports the topics of this module. Fill out a worksheet for each video you report on.
3. Submit the documents in Canvas.

#### **Submitting multiple documents:**

1. After completing the assignment, click the **Submit Assignment** button.
2. Click the **File Upload** tab and click the **Choose File** button.
3. Navigate to your file, select it, and click the **Open** button.
4. Click the **Submit Assignment** button.

#### **Professionalism Role Play Practice**

For the professionalism role play practice, you will need to find someone to practice with. Use the rubric to guide your response.

##### Instructions

1. Read the rubric.
2. Read the scenario. Think of how you'd respond to the customer.
3. Practice your response with someone you know.
4. Ask for feedback or recommendations from the person you are practicing with.
5. Use the feedback to prepare you for the Role Play Exercise.

#### **Professionalism Role Play Exercise**

Go to class to for this role play exercise. You may or may not be videotaped as a part of the evaluation. However, you will receive feedback on your presentation.

##### Instructions

1. Review the rubric.
2. Read the scenario. Think of how you would respond to the customer.
3. Present your response to your instructor.
4. You will be given feedback, which will be uploaded in Canvas.

#### **Professionalism and/or Nonverbal Behavior Written Progress Exam**

This exam will help you and your instructor see how you are progressing in the course. This exam covers the introduction and chapter 1 in the *HVAC Customer Service Handbook*. This exam must be taken in the classroom. You must get a score of 80% or better to move on to the next assignment.

#### **Testing Procedures:**

1. Click **Take this Quiz** link.
2. Read each question and choose the best answer(s).
3. When you have answered all the questions, click the **Submit** button. You will be shown your score.

## Module 2: Communication

### Communication Overview

This module will deal with how to be honest when working with customers even when being honest will not always give the customer the satisfaction they are looking for. This module also deals with the problems that talking too much can create when dealing with your customer and how to actively listen and comprehend what the customer is saying. This module will also look deeper into how to handle difficult customers in solving their problems.

When you have completed this module, you will know how to:

- Communicate clearly, honestly, and accurately with customers.
- Exhibit active listening skills and comprehension of what the customer is saying.
- Use conflict-resolution skills to resolve customer concerns.

### Communication Assignments

In this module, again, pay close attention to the four stories in this chapter. See how the HVAC personnel in these stories learned that saying too much or giving too much information can make things worse. Observe how giving a customer a Service Placebo does not help the situation and how restraint is better than retaliation when working with upset customers. Make sure you understand the Customer Service flowchart on page 62-63 of the handbook.

1. Read chapter 2 Tactical Service Ideas in the *HVAC Customer Service Handbook*, pp. 41-64.
2. View the video presentation for Chapter 2 following along with the handbook.
3. Complete the Communication YouTube assignment.
4. Practice the role-playing exercise with someone you know.
5. Come to class ready to take the Written Progress Exam and perform your role-playing exercise. Make sure you have practiced the role play before coming to class.

### Module 2 YouTube Assignment: Communication

1. Go online to YouTube and find three to four customer service videos that discuss communication in regards to customer service. They can be good or bad examples.
2. Print off and fill out the YouTube video worksheet on the video and explain how it supports the topics of this module. Fill out a worksheet for each video you report on.
3. Submit the documents in Canvas.

### Submitting multiple documents:

1. After completing the assignment, click the **Submit Assignment** button.
2. Click the **File Upload** tab and click the **Choose File** button.
3. Navigate to your file, select it, and click the **Open** button.
4. Click the **Submit Assignment** button.

## Communications Role Play Practice

For the Communications role play practice, you will need to find someone to practice with. Use the rubric to guide your response.

### Instructions

1. Read the rubric.
2. Read the scenario. Think of how you'd respond to the customer.
3. Practice your response with someone you know.
4. Ask for feedback or recommendations from the person you are practicing with.
5. Use the feedback to prepare you for the Role Play Exercise.

## Communications Role Play Exercise

Go to class to for this role play exercise. You may or may not be videotaped as a part of the evaluation. However, you will receive feedback on your presentation.

### Instructions

1. Review the rubric.
2. Read the scenario. Think of how you would respond to the customer.
3. Present your response to your instructor.
4. You will be given feedback, which will be uploaded in Canvas.

## Communication Written Progress Exam

This exam will help you and your instructor see how you are progressing in the course. This exam covers chapter 2 in the *HVAC Customer Service Handbook*. This exam must be taken in the classroom. You must get a score of 80% or better to move on to the next assignment.

### Testing Procedures:

1. Click **Take this Quiz** link.
2. Read each question and choose the best answer(s).
3. When you have answered all the questions, click the **Submit** button. You will be shown your score.

## Module 3: Communication Strategies

### Communication Strategies Overview

This module deals with how to use communication tools like the telephone, cell phone, voice mail, and tablets in a professional way. It also shows you how to choose the correct words and phrasing when speaking with your customer. You will also learn how to tell your customer "No" or in other words how to respond to your customer when the situation outcome is not going to be what the customer wants or expects.

When you have completed this module, you will know how to:

- Use professional tone of voice and demeanor when communicating with customers by phone or voice mail.
- Use appropriate word choice and phrasing when serving customers.
- Explain professional mobile device usage.
- Demonstrate communication strategies that build the customer/company relationship.

### **Communication Strategies Assignments**

Watch for when HVAC reps use technology to communicate in a professional manner. This may include talking on the phone, setting up voice mail, and using your cell phone around customers.

1. Read chapter 3 Relational Service Ideas and the Conclusion in the *HVAC Customer Service Handbook*, pp. 65-90.
2. View the video presentation for Chapter 3 following along with the handbook.
3. Complete the Communication Strategies YouTube assignment.
4. Practice the role play exercise with someone you know.
5. Do the Customer Service Crossword Puzzle found in the back of your handbook on pp. 91-93.
6. Come to class ready to take the Written Progress Exam and perform your role-playing exercise. Make sure you have practiced the role play before coming to class.

### **Module 3 YouTube Assignment: Communication Strategies**

1. Go online to YouTube and find three to four customer service videos that discuss communication strategies in regards to customer service, especially those that use technology while communicating with customers. They can be good or bad examples.
2. Print off and fill out the YouTube video worksheet on the video and explain how it supports the topics of this module. Fill out a worksheet for each video you report on.
3. Submit the document in Canvas.

### **Submitting multiple documents:**

1. After completing the assignment, click the **Submit Assignment** button.
2. Click the **File Upload** tab and click the **Choose File** button.
3. Navigate to your file, select it, and click the **Open** button.
4. Click the **Submit Assignment** button.

### **Communications Strategies Role Play Practice**

For the Communications Strategies role play practice, you will need to find someone to practice with. Use the rubric to guide your response.

## Instructions

1. Read the rubric.
2. Read the scenario. Think of how you'd respond to the customer.
3. Practice your response with someone you know.
4. Ask for feedback or recommendations from the person you are practicing with.
5. Use the feedback to prepare you for the Role Play Exercise.

## Communication Strategies Role Play Exercise

Go to class to for this role play exercise. You may or may not be videotaped as a part of the evaluation. However, you will receive feedback on your presentation.

## Instructions

1. Review the rubric.
2. Read the scenario. Think of how you would respond to the customer.
3. Present your response to your instructor.
4. You will be given feedback, which will be uploaded in Canvas.

## Communication Strategies Written Progress Exam

This exam will help you and your instructor see how you are progressing in the course. This exam covers chapter 3 in the *HVAC Customer Service Handbook*. This exam must be taken in the classroom. You must get a score of 80% or better to move on to the next assignment.

## Testing Procedures:

1. Click **Take this Quiz** link.
2. Read each question and choose the best answer(s).
3. When you have answered all the questions, click the **Submit** button. You will be shown your score.

## Customer Service Crossword Puzzle

Complete the Customer Service Crossword Puzzle on pp 91-93. The answers to the crossword puzzle can be found at [HVAC Book Crossword Answers](#). You will want the answers for the 4th Edition. Compare your answers and review any concepts that you may not understand yet. There is nothing to submit for this assignment.

## Final Competency Exam and Role-Playing Exercise

As stated at the beginning of this course the Competencies for this course, are to be able to:

- Demonstrate professionalism through nonverbal behavior while working with customers and coworkers.
- Use professional, courteous communication when interacting with customers.
- Demonstrate professional communication strategies when interacting with customers.



You have taken an exam and performed a role-playing exercise at the end of each module that dealt with the competencies of each module's topics. Now you will take your final written exam and perform a final role-playing exercise. Again, having great customer service skills is just as important if not more important than technical skills. When you have completed and mastered this course you will receive a special certificate from your instructor that shows you have completed the HVAC Customer Service Soft Skills Course.

### **Testing Procedures:**

1. Click **Take this Quiz** link.
2. Read each question and choose the best answer(s).
3. When you have answered all the questions, click the **Submit** button. You will be shown your score.

### **Written Exam Form A** *(There is a Form B in case the student does not pass Form A)*

This written exam covers the information found in the 4th Edition HVAC Customer Service Handbook. You must get a score of 80% or higher to master the competencies listed for this course and to receive a grade of MC.

### **Testing Procedures:**

1. Click **Take this Quiz** link.
2. Read each question and choose the best answer(s).
3. When you have answered all the questions, click the **Submit** button. You will be shown your score.

### **Final Role-Playing Exercise**

Below is the final role-playing exercise that you need to practice, preferably with a partner. When you are ready, setup a time to come to class to perform this exercise with the instructor. You will then take your final written exam.

# HVAC Customer Service Soft Skills

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## **Module 1: Scenario Practice 1**

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### **Scenario for student**

You are returning to the site of your first call of the day, but it is now 4pm. The customer had a problem with their furnace that you fixed this morning. It is early October. Right now, the temperature is somewhere in the high 80s and you are wondering how the customer will react. Dispatch explained that the furnace is not working now, and the air conditioner will not turn on either.

The customer is very anxious about the situation. Interact with the customer to resolve their concerns.

### **Evaluation Notes for Instructor**

The customer uses the furnace in the morning and the air conditioner in the afternoon to keep the house comfortable during the fall. The customer is anxious about the temperature effects without a functioning unit.

Phrases to use:

“I am very sensitive to temperature changes.”

“I think I might die if I don’t get this fixed today.”

“I am very worried that I broke it by switching between cold and hot. Did I destroy my unit?”

“Is this going to happen again? I need to be prepared for the worst.”

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### **Module 2: Practice Scenario 2**

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#### **Scenario for student**

You have just finished a furnace repair and write up of services and begin reviewing the bill with customer. It is 5:05 pm. As you list the charges, the customer begins to shake their head. The customer tells you that their sister had the exact same repair done on her unit and it was much less expensive.

You don't know anything about the customer's sister's repair.

You know that your company's billing policy begins with a base rate and goes up from there. It is standard practice to round up on hours, so that any time after the hour will be charged as a full hour. You also know that there are peak season fees for air conditioners in the summer, and for heating systems in the winter. Along with that, special fee for traveling outside of the designated service area and service calls after 5pm.

How would you respond to the customer's questions about their bill?

#### **Evaluation Notes for Instructor**

The customer is not happy about paying more than their sister.

Phrases to use:

"Why is my bill more? Did she get a special or something?"

"My sister's AC unit was fixed in the fall. Would that matter?"

"My sister was charged over \$100 less. Do you think that's fair?"

"How is this not robbery?"

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## **Module 3: Practice Scenario 3**

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### **Scenario for student**

You have diagnosed an issue with customer A's furnace and are about to explain it to them when you notice your cell phone light up. The caller ID says "dispatch" so you feel that you should take the call.

When you answer you realize that the call is actually a customer that has been forwarded by the dispatcher.

How would you proceed with Customer A? Customer B? Interact with both customers so you can take the phone call.

### **Evaluation Notes for Instructor**

Customer B is a verbose and talks over others.

Phrases to use:

"Hello, this is Chris Smith. I need some help with my air conditioner. I am pretty sure it is out of coolant, but I don't understand why the corresponder isn't working. I think it might have something to do with the furnace. I am not a furnace fixer per se, but I am kind of handy with various tools. I installed the back-porch light without help and it works great. At least for now."

"The pilot light was out two weeks ago. I mean, it's on now, but you know how these things work. The conduits are all linked right, *ha ha ha*. You know what I mean. Anyway, I just wanted to make sure you agree with me before I crack open the forward components."

"I can check it out myself with videos online. I found one called 'Fix it Quick Yourself: volume 23, furnace repair.' I don't know if you have seen these videos, but they are by a guy named Joseph, Joseph something French sounding. You may or may not have seen these videos, but I have watched a few so I have some of the concepts understood well. Oh, his name is Lafayette. I knew it was French. The sound on this one video is not so great, but I can follow the general idea of what's happening. I watched a video by a different guy who was just selling junk."

"So maybe I can't fix it all by myself. Maybe you can walk me through the disassembly and reassembly. How hard could it be? I have all kinds of wrenches and drill bits and whatnot. I have a big red one. Do you know what that one is called? I have a soldering kit in the garage I can dig out. Probably under a pile of baseball equipment. I used to play shortstop in college. Long time ago. I have the time to learn and the gumption to try. I do think it is just the corresponder."

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**Final: Scenario A1**

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### **Scenario for student**

You are responding to a call for customer Daryl. Another HVAC representative from your company made repairs to this furnace yesterday, but today Daryl called to complain that the unit was still broken. It is a cold winter day with heavy snow. You had an appointment with Daryl at 11am, but the weather, bad traffic because of an accident, and problems at your previous appointments put you behind. You are now arriving nearly three hours late.

You are at the customer's front door. Interact with the customer to resolve their concerns.

### **Evaluation Notes for Instructor**

You are upset because you feel lied to about the unit being fixed and because of the missed time slot. It appeared to be fixed yesterday, but today the unit will turn on, but no air is blowing out of the vents. You are upset to have to call a second visit and you are upset because you assume that you will need to pay twice for the same problem. You missed a lunch meeting because of the HVAC's late arrival.

Phrases to use:

"Why are you five hours late?"

"Why wasn't this done right the first time?"

"I missed an important lunch meeting because of your disrespect."

"I bet I'll have to pay twice for this since you guys didn't do it right the first time. Is this a scam?"

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### **Scenario A2**

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#### **Scenario for student**

You have just finished examining a broken AC unit and now need to tell the customer what you have found. It looks to be five years past the usual life expectancy you normally see for this model and you are surprised it is still in use. The issue is fixable but further repairs may be needed to keep it running in the future.

The customer mentioned to you that his warrantee is about to expire and joked “It would be great if it was a total loss. Then I could just get a new one!” But, you are certain you can fix it, at least for the short term. The future repairs may be more expensive than the ones you are planning to do. Because the unit is so old, upkeep could even cost as much as buying a new unit.

Interact with the customer to resolve their concerns.

#### **Evaluation Notes for Instructor**

Joke at first that you want the HVAC rep to report that the unit needs to be replaced then become more insistent that you NEED a new one covered while it’s still under warranty.

Phrases to use:

“It would be great if it was a total loss. Then I could just get a new one!”

“The warranty expires next month and then it will break soon and I’ll be out the total cost for replacement. It can be our little secret.”

“Are you sure? What can it hurt to help me out?”

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### **Scenario A3**

**For Instructor use ONLY: DO NOT share this document with students.**

#### **Scenario for student**

You are in the middle of repairing a furnace when you feel your cell phone buzzing. The dispatcher has a customer that has some questions. You agree to take the call and the customer is transferred over. Before transferring the dispatcher warns you that the customer is experiencing some static in the call.

Interact with the customer on the phone to answer their question.

#### **Evaluation Notes for Instructor**

Use this dialogue. Muffle or cut out the greyed-out words. Repeat muffled phrases as necessary.

Customer dialog: “Hello, my name is Mark. I was referred to you by my friend Eddie Richards. You fixed his heating system and he said you are the best! The kind of guy who really cares about your customers. I need my furnace looked at. Can you help me? The problem: the machine seems to be very hot when I touch it, but I am not sure why. What temperature should the machine be when you touch it, warm or cold?”

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### Rubric for both Practices and Final

Aspect	2	1	0	Comment
Dress and Grooming	Dress and grooming was clean and met industry expectations.	Dress and grooming was casual or needs improvement.	Dress and grooming was not appropriate.	
Scenario 1: Professionalism	Successfully demonstrated a positive confident attitude and professional tone. Represented the company well.	Was professional, but not positive or confident. Or was polite but did not follow business etiquette.	Tone was negative and unprofessional. Inappropriate or rude to customer.	
Scenario 1: Problem Solving	Was proactive and took responsibility to solve problems. An appropriate solution was offered. Focused on fixing problem, not customer. Used active listening skills.	Offered solutions but was not proactive. Did not listen well to the customer before responding.	Did not provide an appropriate solution for the customer's problem. Ignored customer.	
Scenario 1: Communication	Communicated clearly, accurately, and honestly. Did not over-explain. Was not too technical for the customer.	Communication was accurate, but unclear. Over-explained information or was too technical for the customer to understand.	Was inaccurate or dishonest. Withheld vital information.	
Scenario 1: Conflict Resolution	Utilized effective conflict-resolution strategies.	Struggled to utilize conflict-resolution strategies.	Did not utilize conflict-resolution strategies. Did	



Aspect	2	1	0	Comment
	Offered sincere apology when applicable. Demonstrated empathy.	Offered insincere apology.	not offer apology when applicable.	
Scenario 2: Professionalism	Successfully demonstrated a positive confident attitude and professional tone. Represented the company well.	Was professional, but not positive or confident. Or was polite but did not follow business etiquette.	Tone was negative and unprofessional. Inappropriate or rude to customer.	
Scenario 2: Problem Solving	Was proactive and took responsibility to solve problems. An appropriate solution was offered. Focused on fixing problem, not customer. Used active listening skills.	Offered solutions but was not proactive. Did not listen well to the customer before responding.	Did not provide an appropriate solution for the customer's problem. Ignored customer.	
Scenario 2: Communication	Communicated clearly, accurately, and honestly. Did not over-explain. Was not too technical for the customer.	Communication was accurate, but unclear. Over-explained information or was too technical for the customer to understand.	Was inaccurate or dishonest. Withheld vital information.	
Scenario 2: Conflict Resolution	Utilized effective conflict-resolution strategies. Offered sincere apology when applicable. Demonstrated empathy.	Struggled to utilize conflict-resolution strategies. Offered insincere apology.	Did not utilize conflict-resolution strategies. Did not offer apology when applicable.	

Aspect	2	1	0	Comment
Scenario 3: Professionalism	Successfully demonstrated a positive confident attitude and professional tone. Represented the company well.	Was professional, but not positive or confident. Or was polite, but did not follow business etiquette.	Tone was negative and unprofessional. Inappropriate or rude to customer.	
Scenario 3: Problem Solving	Was proactive and took responsibility to solve problems. An appropriate solution was offered. Focused on fixing problem, not customer. Used active listening skills.	Offered solutions, but was not proactive. Did not listen well to the customer before responding.	Did not provide an appropriate solution for the customer's problem. Ignored customer.	
Scenario 3: Communication	Communicated clearly, accurately, and honestly. Did not over-explain. Was not too technical for the customer.	Communication was accurate, but unclear. Over-explained information or was too technical for the customer to understand.	Was inaccurate or dishonest. Withheld vital information.	
Scenario 3: Conflict Resolution	Utilized effective conflict-resolution strategies. Offered sincere apology when applicable. Demonstrated empathy.	Struggled to utilize conflict-resolution strategies. Offered insincere apology.	Did not utilize conflict-resolution strategies. Did not offer apology when applicable.	

Passing score for each practice is: Module 1 80% = 8 out of 10, Module 2 80% 7 out of 8, Module 3 80% = 7 out of 8

Passing score for Final: 80% = 21 out of 26 points Must complete all three scenarios.