



## Lesson Plans

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### Lesson Plan: Identifying Customer Types – Lesson 1 of 2

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**Sector:** Retail

**Occupation:** Retail Sales Associate

**(NOC 6421)**

**Theme:** Customer Service

**Occupational Task:** To identify the three customer types

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#### Essential Skills (ES) developed during the learning activities:

**Oral Communication:** Greet customers and make general conversation to make them feel comfortable. (ES 1-2)  
Receive information, explanation. (ES 1-2)

**Continuous Learning:** Develop the ability to recognize clues that can help to identify customer types and respond appropriately.

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#### Canadian Language Benchmarks (CLB) competencies developed during the learning activities:

##### Speaking

- Open, maintain and close a short routine formal conversation. (CLB 6/7)
- Describe and compare people. (CLB 6)
- Participate in small group discussion on non-personal familiar topics and issues. (CLB 6/7)

##### Listening

- Identify stated and unspecified details, facts and opinions about situation and relationship of participants containing expression of and response to gratitude and appreciation, complaint, hope, disappointment, satisfaction, dissatisfaction, approval and disapproval. (CLB 7)
- Identify situation, relationship, mood/attitude of participants. (CLB 7)
- Demonstrate comprehension of details and speaker's purpose in suggestions, advice, encouragements and requests. (CLB 6)

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#### Language and culture focus for the learning activities:

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- Expressions of reassurance, polite directness, courtesy, requests for clarification

### Vocabulary

- Department store merchandise such as clothing, kitchen appliances

### Culture

- Piped-in music may make conversation difficult.
- Multiple requests for assistance by customers at the same time may make it difficult for sales associate.

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### Suggested teacher resources and classroom materials needed:

- Photos cut from magazines/internet of potential customers with different attitudes.
- WorkStart Employability Systems and Technologies: Exceeding Your Customer's Expectations, and Managing for Success: Customer Service/computer programs; available at [info@workstart.net](mailto:info@workstart.net) or by phone to Grant Burson (877) 652-8424; <http://www.ttidisc.com/>
- Quality Customer Service by William B. Martin. Reid Publishing Ltd. ISBN 0-931961-95-5 1989 pages 35 – 37
- Customer Service by Harriet Diamond. Steck-Vaughn Co. ISBN 0-8172-6521-X 1997 pages 12 – 18
- Steps to Employment Sales Occupations Citizenship and Immigration Canada 1999 – 2001 pages 110 – 111

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### Estimated time for the learning activities: 2 hours

- One lesson for learners new to the content of customer service or those with minimal experience.
- Instructors should follow this lesson plan with lesson plan 2

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### Learner Profile:

- Learners for this lesson are individuals wishing to pursue a position in retail sales, who may or may not be experienced in this area.

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### Learning Objectives:

- Learner will be able to use appropriate greetings when meeting customers.
- Learner will be able to identify customer type (Security needs, Social needs, Results needs) by listening to provided information and by seeking clarification.
- Learner will use critical thinking skills to explain what characteristics identify a certain customer type.



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### Learning activities:

- Learners relate their own experiences as customers.
- Learners to discuss their needs as customers.
- Learners brainstorm attitudes of customers and possible needs of customers based on their own experiences.
- Instructor extends discussion to include other attitudes and needs that may not have been included.
- Class develops profiles of possible customer types while Instructor records on the blackboard.
- Class develops chart profiling 3 major customer types – security needs, social needs and results needs. (60 minutes)

The class is given different taped customer scenarios to listen to one at a time. Instructor provides time between taped dialogues for pair work. In pairs, learners discuss each scenario to identify the customer type. Some scenarios might include the following:

A customer states:

- I can't believe the blouse is washable. (Security Needs)
- I wish it came in black. Everyone says that black is my colour. (Social Needs)
- It's a gift for my brother in Vancouver and he's quite particular. Maybe I'd better not get it in case he doesn't like it. (Results Needs)
- My brother had one of these and it never seemed to work properly. (Security Needs)
- It's a gift for my mother. She's always wanted a bread maker, but I'm afraid she won't be able to use it. It seems rather complicated. (Results Needs)
- I really like this print, but I think it makes me look too big. (Social Needs) (30 minutes)

Whole class discussion follows. Learners are asked to share the clues that helped them to identify the types. (30 minutes)

F.Y.I. for instructors: Customers who have security needs focus on warranties and guarantees and have a fear of taking risks. Customers with social needs need to be appreciated and have a fear of being ignored. Customers with results needs focus on results and have a fear of failing.

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### Additional and/or extension learning activities:

- Learners work in pairs to generate a scenario and then act it out for others to identify the customer type.

F.Y.I for instructors: If necessary, instructor may need to provide prompt cards to assist learners.

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### Evaluation:

- Informal evaluation – observing students successfully mastering customer type identification through practice with their own scenarios
  - Formal evaluation – instructor gives additional scenarios and asks students to type
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Canadian Language  
Benchmarks/  
Essential Skills

Niveaux de compétence  
linguistique canadiens/  
Compétences essentielles

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the customer. Instructor evaluates results.

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