Soft Skills Lesson Plan: Scenario 2: Decision Making and Integrity in the Workplace - From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp4 2.

The videos are in English but when played on Google Chrome, they can be played with subtitles in various other languages.

For more information about eWORKs and other eWORKs resources, please email eWORKs@casas.org.

Lesson Plan:

Objective:

Students will understand the importance of decision-making, integrity, and how to handle situations where there may be unethical behavior in the workplace. They will explore the consequences of different actions and develop strategies for addressing ethical dilemmas.

Materials Needed:

- · Whiteboard or projector for notes
- Handouts of the scenario and discussion points (optional)
- Markers or pens

1. Introduction (10 minutes)

Start by discussing the importance of ethical behavior and integrity in the workplace. Ask students if they have ever encountered or heard of situations in which a co-worker or a peer faced an ethical dilemma (e.g., lying on a timecard, taking office supplies, etc.).

Key Discussion Points:

- Why is integrity important in a professional environment?
- How do unethical actions affect the workplace?
- What could happen to someone's reputation if they're caught lying or breaking the rules?

Introduce the scenario to the class:

2. Scenario Overview (5 minutes)

Read the following scenario aloud to the class:

"Darren arrives at work at 11:00. However, when Julio accidentally sees Darren's timecard, Darren wrote that he arrived at 10:30. What should Julio do?"

Ask the class to think about the possible courses of action and consider how Julio should respond in this situation. Write the four choices on the board.

3. Group Discussion and Activity (15 minutes)

Step 1: Present the Choices

Present the four choices for what Julio could do and briefly explain each one:

A. Go ask Darren about the timecard. [BEST]

 Julio knows the timecard is wrong but isn't sure why. By asking Darren, Julio can clarify whether it was an innocent mistake or intentional.

• B. Tell the Supervisor. [WORST]

 Reporting to the supervisor right away assumes that Darren is intentionally dishonest, which could be a wrong assumption. It may damage relationships without a full understanding of the situation.

C. Change the timecard and say nothing about it to anyone.

o This action may seem like a quick fix, but it's unethical and doesn't address the problem. It also could enable further dishonesty.

D. Do nothing since it's not your job to monitor timecards.

 Ignoring the situation may seem like a neutral choice, but it could encourage a culture of indifference toward unethical behavior, harming both the company and the employees.

Step 2: Discussion Points

Have students discuss the possible consequences of each choice in small groups or as a class. Focus on:

- How would each action affect the team dynamics?
- What potential long-term consequences could occur from making each decision?
- How might Julio's actions reflect on his own character and work ethic?

Step 3: Reflection

Ask the students which of the four actions they think is the most ethical and why. Then, guide them toward the correct answer by discussing the importance of seeking more information (Choice A), acting with integrity, and preserving relationships.

4. Class Discussion (10 minutes)

Ask the following questions to deepen the discussion:

- 1. Why is it important to understand the context before jumping to conclusions (e.g., before telling the supervisor or making assumptions about Darren's actions)?
 - Emphasize that obtaining more information can prevent misunderstandings and help make the most effective decisions.
- 2. What are the risks of taking no action in a workplace where unethical behavior is occurring?
 - Discuss how a lack of action can lead to a toxic work environment, decreased trust, and even legal or financial consequences for the employer.
- 3. What are the benefits of trying to resolve issues directly with others before involving a supervisor?
 - Highlight the importance of open communication and personal responsibility in the workplace.

5. Summary and Key Takeaways (5 minutes)

Summary Comments:

- Falsifying timecards is a form of theft, and it's crucial that employees protect their employers from such theft.
- Making assumptions can lead to harmful consequences. It's important to gather information before deciding on an action.
- In many situations, speaking directly with the person involved is the best first step. This helps preserve relationships and allows for a better understanding of the situation.

Key Takeaways:

- Integrity and honesty should be practiced in all workplace interactions.
- Decision-making should be thoughtful, and it's important to consider the full context before taking action.
- **Communication** with colleagues is key to resolving misunderstandings and maintaining a positive work environment.

6. Conclusion and Reflection (5 minutes)

To close the lesson, ask students to reflect on the following:

 Have you ever faced a situation where you had to make a difficult decision at work or school? How did you handle it? • Why is it important to act ethically, even when others may not be watching?

Encourage students to share their thoughts or write down a reflection on how they would approach similar situations in their own lives.

Soft Skills Lesson Plan: Scenario 3: Integrity and Decision Making in the Workplace - From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp4 2.

The videos are in English but when played on Google Chrome, they can be played with subtitles in various other languages.

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Lesson Plan:

Objective:

Students will learn about the importance of integrity and ethical decision-making in the workplace. They will explore how to handle situations where a coworker asks them to participate in unethical behavior and how to address rule violations effectively.

Materials Needed:

- · Whiteboard or projector for notes
- Handouts of the scenario and discussion points (optional)
- Markers or pens

1. Introduction (10 minutes)

Warm-up Discussion: Start by asking students:

- What is integrity? Why is it important in a professional environment?
- Have you ever witnessed someone ask you or a coworker to break a rule? How did you respond?

Introduce the Lesson Topic: Today's lesson is about how to respond when someone asks you to do something unethical at work, like altering a timecard. It's essential to make good decisions when faced with situations that challenge your integrity.

2. Scenario Overview (10 minutes)

Present the Scenario: Read aloud or display the following scenario to the class:

"Julio is in the break room. Darren walks in and notices Julio looking at the timecards. Darren explains to Julio that he has been altering his timecard for a month and that Julio should do it as well. What should Julio do?"

Clarify the Situation:

- What does the scenario suggest about Darren's behavior?
- How does Julio feel? What are his options?

3. Presenting the Choices (10 minutes)

Present the four choices for what Julio could do in this situation. Write the choices on the board or display them.

- A. Tell Darren he can't do that anymore or you'll tell the Supervisor. [BEST]
 - This choice reflects strong ethical standards. Julio directly addresses the inappropriate behavior and gives Darren a clear warning. It sets a firm boundary and puts the responsibility on Darren to stop.
- B. Tell Darren that he shouldn't do that anymore and then plan to tell the Supervisor.
 [WORST]
 - While it's important to acknowledge the wrong behavior, going behind Darren's back to report him could cause workplace tension and damage relationships with co-workers. It's crucial to give Darren a chance to correct the behavior first.
- C. Tell Darren you won't do that, but do nothing since it's not your job to monitor timecards.
 - Although Julio refuses to participate in unethical behavior, this choice fails to address the problem fully. Doing nothing leaves room for continued misconduct. Every employee has a responsibility to safeguard the workplace.
- D. Tell Darren no and that he shouldn't do it anymore either.
 - Julio directly refuses to participate in the unethical behavior, but this approach is not strong enough considering the severity of the issue. Julio should be firmer and more specific, including the possibility of reporting it if Darren doesn't stop.

4. Group Discussion (15 minutes)

Step 1: Small Group Discussion (7 minutes)

 Break the students into small groups and ask them to discuss which action Julio should take and why. They should consider the impact of each choice on their relationship with Darren, the company, and their own integrity.

Step 2: Class Discussion (8 minutes)

- Ask each group to share their thoughts and reasoning. Facilitate the discussion with questions such as:
 - What could happen if Julio does nothing or if he doesn't confront Darren?
 - Why is it important to address unethical behavior directly with the person involved before reporting to a supervisor?
 - o How can Julio protect his own integrity while also addressing the behavior of his coworker?
 - o What might be the consequences for Darren if Julio doesn't intervene?

Goal of Discussion:

Guide students toward understanding that while all actions should be respectful, addressing unethical behavior head-on with the person involved is the best first step. If unethical behavior continues, it must be reported to the supervisor.

5. Key Takeaways and Ethics in the Workplace (10 minutes)

Summary Comments:

- Falsifying timecards is theft, and every employee has an ethical responsibility to protect their employer from such theft.
- Julio's role is to stop the unethical behavior and remind Darren of the rules. It's important to give Darren a chance to correct his actions before escalating to management.
- If Darren refuses to change his behavior, Julio should take the next step and report it to a supervisor.

Class Discussion on Integrity:

- Why should employees stand up for what's right, even when it may be uncomfortable?
- What are the potential consequences of allowing unethical behavior to continue unchecked in a workplace?
- How do actions like these impact team dynamics and workplace culture?

6. Real-World Application: Reflect and Role Play (15 minutes)

Step 1: Reflection (5 minutes) Ask students to reflect on a time they faced a difficult decision at school or work. What did they do? What would they do differently now that they've learned about the importance of integrity and handling rule violations?

Step 2: Role-Playing Activity (10 minutes)

- In pairs, students will take turns role-playing the scenario. One student plays Julio, and the other plays Darren. Julio should practice how to respond firmly but respectfully to Darren's request to alter timecards.
- After each role-play, ask the students to provide feedback to their partner about how well they handled the situation and how they could improve.

7. Conclusion and Recap (5 minutes)

Wrap-Up Discussion:

- Reinforce the importance of integrity in the workplace.
- Summarize the key lesson: It's essential to make ethical decisions and stand firm in the face of unethical requests, both for personal integrity and the benefit of the organization.

Homework (Optional): Ask students to write a short reflection on the lesson, discussing how they would respond to unethical behavior in a workplace and why integrity is crucial for professional success.

Soft Skills Lesson Plan: Scenario 4: Taking Responsibility and Learning from Mistakes in the Workplace

- From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp4 2.

The videos are in English but when played on Google Chrome, they can be played with subtitles in various other languages.

For more information about eWORKs and other eWORKs resources, please email eWORKs@casas.org.

Lesson Plan

Objective:

Students will understand the importance of taking responsibility for mistakes in the workplace, accepting feedback, and showing a willingness to learn. They will explore different ways to respond to feedback and how these responses affect their professional development.

Materials Needed:

- Whiteboard or projector for notes
- Handouts of the scenario and discussion points (optional)
- Markers or pens

1. Introduction (10 minutes)

Warm-up Discussion: Begin with a discussion about mistakes in the workplace:

- Have you ever made a mistake at work or in school? How did you handle it?
- Why is it important to take responsibility for your actions?
- How does taking responsibility affect your relationship with supervisors and colleagues?

Introduce the Topic: Today's lesson is about responding to feedback and learning from mistakes in the workplace. Everyone makes mistakes, especially when starting a new job, and how you handle those mistakes can have a big impact on your success at work.

2. Scenario Overview (10 minutes)

Present the Scenario: Read aloud or display the following scenario to the class:

"John is a salesperson in the Men's department in a large retail store. He is new and is not familiar with proper protocol for various situations. Earlier in the day, a customer wanted to return an item. Not knowing how to handle the situation, John sent the customer to Customer Service. The line was very long, and the customer complained about John. Salespersons are supposed to handle item returns. John's Supervisor, Matt, is discussing the situation with him. What should John do?"

Clarify the Situation:

- What was John's mistake in this situation?
- How might the supervisor, Matt, feel about this mistake?
- How should John handle the feedback from his supervisor?

3. Presenting the Choices (10 minutes)

Present the four choices for how John could respond. Write the choices on the board or display them.

- A. Agree that Matt is right and promise that it won't happen again.
 - This response shows that John acknowledges his mistake and agrees with the supervisor.
 However, it would be stronger if John also expressed a willingness to learn and improve rather than just promising to avoid this specific mistake in the future.
- B. Apologize and promise to try harder and not make mistakes.
 - While John's apology is good, promising to avoid all mistakes in the future can sound unrealistic. It's more important to show a desire to learn from the experience and improve.
- C. Apologize and restate that things were busy and that he hasn't been trained on everything.
 - Apologizing is important, but offering excuses can come across as defensive. It's better to acknowledge the mistake and show a willingness to learn rather than shifting the blame to the circumstances.
- D. Agree that Matt is right and state that you have a lot to learn.
 - This is the best response. John admits the mistake, agrees with his supervisor, and shows openness to learning and improving. This attitude will likely be appreciated by Matt and help John grow in the job.

4. Group Discussion (15 minutes)

Step 1: Small Group Discussion (7 minutes)

- Break the students into small groups and ask them to discuss which response would be best for John and why. Have them consider:
 - o What are the advantages of agreeing with the supervisor and admitting the mistake?

- o How can showing openness to learning improve John's job performance in the future?
- What impact might each of the responses have on John's relationship with his supervisor and his job success?

Step 2: Class Discussion (8 minutes)

- Ask each group to share their thoughts with the class. Facilitate the discussion with questions such as:
 - o What makes response **D** the most effective?
 - Why is it important to avoid making excuses when responding to feedback?
 - How can a positive response to feedback lead to personal growth and better performance in the workplace?

Goal of Discussion:

Guide students toward understanding that acknowledging mistakes, accepting responsibility, and showing a willingness to learn are all key components of professional growth. This will help students build self-esteem and develop a positive relationship with supervisors and colleagues.

5. Key Takeaways and Self-Esteem in the Workplace (10 minutes)

Summary Comments:

- When you make a mistake, how you respond is just as important as the mistake itself. A positive, open attitude toward learning can turn a mistake into an opportunity for growth.
- Openness to feedback and a desire to improve are crucial for success in any job. Supervisors appreciate employees who take responsibility and show a willingness to learn.
- **Self-esteem** plays a role in how we handle mistakes. It's important to have confidence in your ability to improve and grow rather than focusing on the mistake itself.

Class Discussion on Self-Esteem and Responsibility:

- Why is it important to view mistakes as learning opportunities?
- How can handling mistakes well contribute to a person's overall success at work?

6. Role-Playing Activity (15 minutes)

Step 1: Role-Playing (10 minutes)

• In pairs, students will take turns role-playing the scenario. One student will play John, and the other will play the supervisor, Matt.

- John should practice responding to feedback in a positive and responsible way (following the best response, **D**).
- After each role-play, ask the students to give each other feedback on how they handled the situation and what they could improve.

Step 2: Reflection (5 minutes)

• Ask the class to reflect on how role-playing the scenario helped them understand the importance of taking responsibility and learning from mistakes.

7. Conclusion and Recap (5 minutes)

Wrap-Up Discussion:

- Reinforce the idea that mistakes are a natural part of any job, but how we respond to them can make a big difference in our success.
- Summarize the importance of accepting feedback, being open to learning, and taking responsibility for our actions.

Homework (Optional): Ask students to write a reflection on a time when they made a mistake in the workplace or school. How did they respond? What would they do differently now, based on today's lesson?

Soft Skills Lesson Plan: Scenario 6: Responsibility and Commitment to Quality in the Workplace - From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp4 2.

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For more information about eWORKs and other eWORKs resources, please email eWORKs@casas.org.

Lesson Plan

Objective:

Students will learn about responsibility, commitment to quality, and how to handle unexpected situations in the workplace. They will explore the importance of finishing tasks, adapting to changing circumstances, and creating goodwill among coworkers.

Materials Needed:

- · Whiteboard or projector for notes
- Handouts of the scenario and discussion points (optional)
- Markers or pens

1. Introduction (10 minutes)

Warm-up Discussion: Start the lesson with a brief conversation about teamwork and responsibility:

- Can you think of a time when you had to stay late or work extra hours to finish something important? How did you feel about it?
- Why is it important to finish what you started, even when unexpected tasks come up at the end of the day?
- How do you feel when a coworker helps you out at the last minute?

Introduce the Lesson Topic: Today's lesson is about handling unexpected situations in the workplace. Sometimes, work doesn't go as planned, and it's important to stay committed to quality and finish what needs to be done, even if it's the last minute.

2. Scenario Overview (10 minutes)

Present the Scenario: Read aloud or display the following scenario to the class:

"Jodi and Jay work in a small kitchen in a small family restaurant. Most duties involve washing dishes, cleaning the kitchen floor, and tables. Their shift ends very soon. Jay is exhausted, and Jodi has plans for after work. At the last minute, a cartful of dishes from a large table arrives in the kitchen and requires cleaning. It will take at least an hour to finish. What should Jay do?"

Clarify the Situation:

- What was expected of Jay and Jodi when their shift was near the end?
- Why is it important to handle last-minute tasks like these?
- How can Jay show commitment to the team and a willingness to go above and beyond?

3. Presenting the Choices (10 minutes)

Present the four choices for how Jay could respond. Write the choices on the board or display them.

- A. Suggest asking the manager if you can leave the dishes until tomorrow. [WORST]
 - This choice is inflexible and shows a lack of understanding about the workplace.
 Employers value employees who can adapt to unexpected situations rather than avoid them. Asking to leave the task for tomorrow is not a practical solution.
- B. Offer to finish the dishes so Jodi can leave when Steve arrives. [BEST]
 - This is the best option. Jay is being adaptable and prioritizing the needs of the workplace.
 By finishing the task, he helps Jodi meet her plans while also ensuring the work is completed. This creates goodwill between coworkers and shows commitment to quality.
- C. Suggest that Jodi call Steve and let him know that she will be late.
 - While this option helps Jodi, it shifts the responsibility to her, which might not be ideal if Jay can handle the work himself. It also assumes Jodi is willing to stay late. It's better to offer help instead of shifting the burden to someone else.
- D. Offer to finish up tonight if Jodi will do the same someday.
 - This choice is a gesture of goodwill, but asking for a "payback" could create an uncomfortable situation. It's better to help out without expecting anything in return.
 Offering help without strings attached is more effective.

4. Group Discussion (15 minutes)

Step 1: Small Group Discussion (7 minutes)

• Break the students into small groups and ask them to discuss which option Jay should choose and why. They should consider:

- o What are the benefits of offering to finish the task so Jodi can leave?
- o How does helping out at the last minute affect workplace relationships?
- o Why is it important to be flexible and adaptable in a work environment?

Step 2: Class Discussion (8 minutes)

- Ask each group to share their thoughts with the class. Facilitate the discussion with questions such as:
 - How does offering to finish the dishes show responsibility and commitment to quality?
 - o What are the long-term benefits of creating goodwill among coworkers?
 - How might Jay's response affect his relationship with Jodi and the overall work atmosphere?

Goal of Discussion:

Guide students toward understanding that workplace flexibility, finishing tasks, and being willing to help coworkers, even at personal expense, is crucial for success in any job. This shows a strong work ethic and helps maintain a positive work environment.

5. Key Takeaways and Work Ethic in the Workplace (10 minutes)

Summary Comments:

- In the workplace, **unexpected tasks** often arise, and employees who can adapt and finish the job are highly valued by employers.
- Commitment to quality means completing tasks to the best of your ability, even when they come up at the last minute. Doing so builds your reputation as a reliable team member.
- **Good customer and coworker relations** are essential. By offering to help, Jay strengthens his relationship with Jodi and creates a positive work environment.

Class Discussion on Work Ethic:

- How does helping out at the last minute benefit both Jay and Jodi?
- Why is flexibility and adaptability so important in a work environment?

6. Role-Playing Activity (15 minutes)

Step 1: Role-Playing (10 minutes)

• In pairs, students will take turns role-playing the scenario. One student will play Jay, and the other will play Jodi.

- Jay should practice offering to finish the dishes to let Jodi leave, showing responsibility and commitment to the team.
- After each role-play, ask the students to give each other feedback on how they handled the situation and what they could improve.

Step 2: Reflection (5 minutes)

• Ask the class to reflect on how role-playing the scenario helped them understand the importance of responsibility, commitment, and creating goodwill in the workplace.

7. Conclusion and Recap (5 minutes)

Wrap-Up Discussion:

- Reinforce that unexpected tasks happen in every job, and the ability to finish tasks and help coworkers is a valuable trait.
- Summarize the key lesson: **Responsibility and adaptability** are essential for success in the workplace, as is creating goodwill among coworkers.

Homework (Optional): Ask students to write a short reflection on a time when they had to deal with an unexpected situation in a job, school, or life. How did they handle it? What would they do differently now, based on today's lesson?

Soft Skills Lesson Plan: Scenario 7: Prioritizing Tasks and Customer Service in the Workplace - From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp4 2.

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Lesson Plan

Objective:

Students will learn how to prioritize tasks and make effective decisions in the workplace when confronted with competing demands. They will explore the importance of balancing customer service and other job responsibilities, and how to make decisions that benefit both the company and the customer.

Materials Needed:

- Whiteboard or projector for notes
- Handouts of the scenario and discussion points (optional)
- Markers or pens

1. Introduction (10 minutes)

Warm-up Discussion: Start by asking students the following questions:

- Have you ever been in a situation where you had multiple things to do at once? How did you
 decide what to do first?
- Why is it important to help customers when they need assistance, even if you have other tasks to complete?
- How can setting priorities impact the success of a business?

Introduce the Lesson Topic: Today's lesson is about **setting priorities** and **decision-making** in the workplace. You will learn how to handle situations where your tasks compete with the need for customer service. Balancing both is important for your success and the business's success.

2. Scenario Overview (10 minutes)

Present the Scenario: Read aloud or display the following scenario to the class:

"Tyler is busy stocking shelves and is scheduled to go on break in a few minutes. A fellow employee explains that the store is getting busy and requests Tyler's assistance. What should Tyler do?"

Clarify the Situation:

- What task is Tyler working on when the request for help comes in?
- What is Tyler's priority in this situation?
- How should Tyler balance taking a break with helping out a coworker?

3. Presenting the Choices (10 minutes)

Present the four choices for how Tyler could respond. Write the choices on the board or display them.

- A. Offer to help as soon as your work is done and then take your break. [WORST]
 - While this shows Tyler wants to finish his current task, customer service is a higher priority.
 Leaving customers without help could hurt their experience. This is not the best choice because it delays helping the customers when they need it.
- B. Ask the associate to see if he can find someone else but help him if he can't.
 - This response is somewhat considerate, but it might take time for the associate to find someone else to help. Meanwhile, customers could be left waiting. It shows a concern for customer service but doesn't act quickly enough.
- C. Offer to help immediately and take your break after finishing the shelves. [BEST]
 - This is the best response because it prioritizes customer service while showing that Tyler is willing to adjust his break to help. He can finish the current task after helping, showing a commitment to both work responsibilities and teamwork. This is the most efficient and customer-focused choice.
- D. Offer to help immediately and finish the shelves after taking your break.
 - While Tyler is showing concern for customers, this choice delays restocking the shelves.
 It's important to maintain stock levels for customers to purchase, so this would not be the best choice. Restocking should be completed before the break.

4. Group Discussion (15 minutes)

Step 1: Small Group Discussion (7 minutes)

• Break the students into small groups and ask them to discuss which option Tyler should choose and why. They should consider:

- o What are the benefits of offering to help immediately with customers?
- How does helping customers first affect the store's success?
- Why is it important to consider both the big picture and individual tasks when making decisions?

Step 2: Class Discussion (8 minutes)

- Ask each group to share their thoughts with the class. Facilitate the discussion with questions such as:
 - Why is C. Offer to help immediately and take your break after finishing the shelves the best choice?
 - How does balancing customer service and task completion lead to better business outcomes?
 - What are the potential consequences of waiting until after your break to help the customer?

Goal of Discussion: Guide students toward understanding that customer service is a priority, but tasks like restocking shelves are also important. In many cases, it's best to show flexibility and willingness to adjust your plans when the needs of the business require it.

5. Key Takeaways and Decision-Making Skills (10 minutes)

Summary Comments:

- **Customer service** is a key business priority. Employees should make decisions that best serve customers and the business, even if it means rescheduling tasks.
- When confronted with **competing work demands**, it is important to look at the **big picture** and prioritize your actions. In this case, helping the customer is more pressing than finishing stocking the shelves immediately.
- Developing good **decision-making skills** helps improve both individual performance and the overall success of the business.

Class Discussion on Decision-Making:

- Why is it important to adapt to changing situations at work?
- How do your decisions affect your coworkers and the overall work environment?

6. Role-Playing Activity (15 minutes)

Step 1: Role-Playing (10 minutes)

- In pairs, students will take turns role-playing the scenario. One student will play Tyler, and the other will play the coworker requesting help.
- Tyler should practice offering immediate help to the coworker while showing a commitment to getting the job done and maintaining customer satisfaction.
- After each role-play, ask the students to give each other feedback on how they handled the situation and what they could improve.

Step 2: Reflection (5 minutes)

• Ask the class to reflect on how role-playing the scenario helped them understand how to prioritize tasks and the importance of balancing customer service with other job responsibilities.

7. Conclusion and Recap (5 minutes)

Wrap-Up Discussion:

- Reinforce that balancing priorities is a key skill in any job. Being flexible and adjusting to the needs of the business will help you be a more effective employee.
- Summarize the lesson: **Customer service and prioritizing tasks** go hand in hand. When you can make decisions that help both the customers and the business, you contribute to a positive workplace.

Homework (Optional): Ask students to write a short reflection on a time when they had to prioritize one task over another. How did they make their decision? What would they do differently now, based on today's lesson?

Soft Skills Lesson Plan: Scenario 8 : Effective Sales Skills – Understanding Customer Needs and Product Knowledge - From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp4 2.

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Lesson Plan

Objective:

- Primary Goal: Help students understand how to manage customer interactions, assess their needs, and offer solutions based on product knowledge rather than simply relying on price as the deciding factor.
- **Skills Focus:** Customer relations, commitment to quality, sales strategies, uncovering customer needs, decision-making based on product knowledge.

Target Audience:

• Sales staff in retail environments (specifically in the home goods or blinds department), especially those who are new and may not have extensive product knowledge.

1. Introduction (10 minutes)

Objective:

- Set the stage for understanding the importance of product knowledge and effective communication in sales.
- Introduce the situation with Gene as a case study.

Activity:

Present the Situation:

Gene is a salesperson in the blinds department of a large store. He is new to the department and not familiar with all of the products. He is with a customer who is having difficulty selecting blinds. The customer states that she should purchase the most expensive blinds since they are probably the best. What should Gene do?

Discussion Prompt:

What are the challenges Gene faces in this situation?

- Why might the customer believe that the most expensive blinds are always the best choice?
- What should Gene do in this situation to ensure the customer is making the best choice?

2. Direct Instruction (15 minutes)

Objective:

Discuss the four response options provided in the scenario and analyze their pros and cons.

Activity:

- Present the 4 Options Gene Could Take:
 - A. Agree with the customer's choice and say that she can't go wrong buying the more expensive kind.
 - Discussion: Why is this response problematic? What could Gene be overlooking? Is it good practice to make such a general statement about an expensive product without understanding the customer's needs?
 - o B. Suggest that the customer should look further before deciding which is best.
 - Discussion: Why is this the best approach? What is the benefit of encouraging further exploration of the options?
 - C. Explain that the more expensive blinds may not be better and suggest buying something less expensive.
 - Discussion: Why is this response not ideal? How does it lack focus on the customer's specific needs and preferences? Why is price alone not a good basis for a recommendation?
 - D. Offer to find someone else with more experience to help the customer decide.
 - Discussion: Why is asking for assistance premature? What should Gene have done first before offering to get help? How can Gene begin to assist the customer with her decision?

Key Concept: Gene needs to understand that making a recommendation based on price alone is not effective. Instead, he should focus on understanding the customer's needs and guiding her to the best solution based on those needs.

3. Group Discussion and Role-Playing (20 minutes)

Objective:

 Engage students in practicing active listening and questioning techniques to uncover customer needs. Practice handling customer interactions in a way that builds rapport and trust.

Activity:

- Divide students into pairs.
- **Role-playing:** Have one student play Gene and the other play the customer. The customer will insist on buying the most expensive blinds. The salesperson (Gene) should use the following skills:
 - Ask questions to uncover the customer's specific needs (e.g., "What is your primary goal with these blinds?" "What room are you planning to use them in?").
 - Use active listening to demonstrate understanding of the customer's preferences.
 - Guide the conversation toward finding a solution that meets the customer's needs.
- After 5 minutes, switch roles.

Debrief:

• Discuss what worked well in each role-play. What strategies did students use to identify the customer's needs? How did they shift the focus away from just price to other factors like functionality, aesthetics, and quality?

4. Concept Reinforcement (10 minutes)

Objective:

 Emphasize the importance of taking time to assess customer needs before making a recommendation.

Activity:

- Lecture and Discussion: Highlight the following points:
 - Salespeople should avoid making assumptions about what the customer wants based on price alone.
 - Sales should be based on an understanding of the customer's needs, preferences, and the value of the product.
 - Gene should not rush to provide answers but rather explore options with the customer.
 - In a situation where the salesperson feels unsure, it's best to guide the customer through their decision-making process rather than relying on an immediate solution.

Real-life Example: Share an example (either personal or hypothetical) where a salesperson succeeded by focusing on the customer's needs rather than pushing a high-priced item.

5. Reflection and Conclusion (5 minutes)

Objective:

• Encourage students to reflect on what they learned and how they can apply it in their roles.

Activity:

- Reflection: Ask students to reflect on the following questions:
 - What did you learn about handling customer inquiries when you are not fully familiar with the product?
 - o How can you ensure that you are genuinely helping the customer rather than just making a sale?
 - o Why is asking the right questions key in sales?
- **Conclusion:** Reinforce that successful sales are based on providing value, not simply pushing expensive products. Understanding the customer's needs is key to making the best recommendation.

Assessment:

- Ongoing Observation: During role-plays, observe students' ability to ask open-ended questions, actively listen, and redirect the conversation to uncover customer needs.
- **Final Discussion:** At the end of the session, assess how well students can articulate why option B is the best choice and how they would apply it in a real-world scenario.

Materials Needed:

- Whiteboard/flip chart for listing discussion points.
- Printed copies of the situation and options for students to refer to.
- Role-play scenario cards.

Additional Notes:

- **Customization:** Adapt the lesson to include specific product details for the students' department or industry (e.g., blinds, electronics, etc.).
- **Follow-up:** Consider offering a follow-up session where students can demonstrate their sales techniques with real customers or in a simulated environment.

Soft Skills Lesson Plan: Scenario 9: Effective Decision-Making in Customer Service – Managing Multiple Clients - From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp4 2.

The videos are in English but when played on Google Chrome, they can be played with subtitles in various other languages.

For more information about eWORKs and other eWORKs resources, please email eWORKs@casas.org.

Lesson Plan

Objective:

- **Primary Goal:** Help students learn how to prioritize and manage multiple customer needs effectively, ensuring both phone and in-store customers receive the best possible service.
- **Skills Focus:** Decision making, customer relations, judgment, prioritization, effective communication.

Target Audience:

• Sales associates in retail environments, particularly those who handle both in-store and phone-based customer inquiries.

1. Introduction (10 minutes)

Objective:

 Set the stage for discussing customer service priorities and the challenges of handling multiple customers simultaneously.

Activity:

Present the Situation:

o Gene works in the blinds department of a large store. He answers a call from a customer inquiring about a set of blinds. He tells the customer that he must check the back stockroom and puts them on hold. While on his way to the back, another customer in the store stops him and asks for assistance. What should Gene do?

Discussion Prompt:

- What are the main challenges Gene faces in this situation?
- How should Gene prioritize his tasks and manage the expectations of both customers?

• Why is it important to treat phone customers with the same level of courtesy as in-store customers?

2. Direct Instruction (15 minutes)

Objective:

• Explore the various options Gene has to manage both customers, discussing the pros and cons of each approach.

Activity:

- Present the 4 Options Gene Could Take:
 - A. Explain that you're helping someone on the phone, and you'll be with her as soon as you're done.
 - *Discussion:* Why is this the best option? How does this approach maintain fairness and transparency? What are the customer expectations for service when they know they will be assisted soon after another customer?
 - o B. Ask the customer on the phone if they wouldn't mind holding an extra minute.
 - Discussion: Why is this the worst choice? What risks are associated with leaving a customer on hold for an extended period? How might this negatively impact the customer's experience and perception of service?
 - C. Ask the customer on the phone if you can call her back in a few minutes so she won't have to keep holding.
 - Discussion: Why is this option not ideal? While it respects the phone customer's time, it may create more frustration. What is the importance of balancing communication with both customers?
 - D. Refer the customer in the store to another salesperson so that she can be helped now.
 - Discussion: When is it appropriate to pass off a customer to another salesperson?
 What are the potential downsides to this approach, and how might it affect the instore customer's experience?

Key Concept: Managing multiple customers effectively requires balancing customer expectations, maintaining clear communication, and prioritizing based on urgency and fairness. Each customer should feel valued and understood.

3. Group Discussion and Role-Playing (20 minutes)

Objective:

• Engage students in practicing prioritization and communication skills through role-playing.

Activity:

- Divide students into pairs or small groups.
- **Role-Playing:** One student will play Gene, while the other students act as the customers (both the phone customer and the in-store customer). The scenario should unfold as follows:
 - o The phone customer inquires about the blinds and is put on hold.
 - o The in-store customer then stops Gene to request assistance.
 - The "Gene" role should use the communication skills discussed (e.g., explaining that he'll assist the phone customer soon, offering to call back, etc.).
- After 5 minutes, students switch roles and repeat the scenario.

Debrief:

- Discuss the different strategies used by the students. How did they manage both customers' expectations?
- Did any of the students experience difficulty in prioritizing or managing customer reactions? How did they handle it?

4. Concept Reinforcement (10 minutes)

Objective:

• Emphasize the importance of balancing customer needs and maintaining effective communication.

Activity:

- Lecture and Discussion: Highlight the following points:
 - All customers, whether in-store or on the phone, should be treated with respect and fairness. This includes providing timely updates, offering alternatives, and being transparent about wait times.
 - The best approach is to ensure both customers understand the situation and feel that their needs are being prioritized appropriately.
 - When faced with multiple customers, it's important to assess which customer needs immediate assistance and communicate this clearly.

Real-life Example: Share an example where prioritizing customer needs effectively led to a positive outcome. Discuss how managing both in-store and phone customer interactions can impact customer satisfaction and loyalty.

5. Reflection and Conclusion (5 minutes)

Objective:

 Encourage students to reflect on their learning and how they can apply these skills in real-world situations.

Activity:

- Reflection: Ask students to consider the following questions:
 - How would you handle a similar situation with both an in-store customer and a phone customer?
 - Why is it important to be transparent and set clear expectations for both customers?
 - How can effective communication influence a customer's perception of the service they receive?
- Conclusion: Reinforce that in retail, handling multiple customers efficiently is key to delivering high-quality service. Prioritizing based on urgency, being transparent, and offering clear communication can help balance competing customer needs.

Assessment:

- **Ongoing Observation:** During role-playing, observe students' ability to manage both customers, communicate clearly, and prioritize effectively.
- **Final Discussion:** Evaluate how well students explain why option A (explaining to the phone customer that they will be assisted soon) is the best choice. Assess their ability to prioritize and manage customer expectations.

Materials Needed:

- Whiteboard/flip chart for listing discussion points.
- Printed copies of the situation and options for students to refer to.
- Role-play scenario cards.

Additional Notes:

• **Customization:** Adapt the lesson to reflect the specific types of customer interactions in your retail environment (e.g., multiple phone calls, in-person service).

•	Follow-up: Consider a follow-up session where students can practice these skills with real customers or in simulated environments.

Soft Skills Lesson Plan: Scenario 12: Navigating Work-Life Balance and Maintaining Professional Integrity - From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp4 2.

The videos are in English but when played on Google Chrome, they can be played with subtitles in various other languages.

For more information about eWORKs and other eWORKs resources, please email eWORKs@casas.org.

Lesson Plan

Objective:

- **Primary Goal:** Help students understand how to manage personal obligations and work commitments professionally, while maintaining integrity and responsibility in challenging situations.
- **Skills Focus:** Responsibility, sociability, professionalism, integrity, work-life balance.

Target Audience:

• Employees in various fields, especially those in roles where personal responsibilities may conflict with work commitments (e.g., healthcare, customer service, retail).

1. Introduction (10 minutes)

Objective:

• Set the stage for discussing how to handle situations where personal commitments conflict with work responsibilities.

Activity:

Present the Situation:

o JoAnne is a single parent working as an Orderly in a community hospital. One of her children calls and asks her to attend a sports game they are participating in. The game starts an hour before her shift ends. JoAnne asks her Supervisor if she can leave early. The Supervisor explains that there is a mandatory meeting tonight that everyone is required to attend, so she cannot leave early. What should JoAnne do?

Discussion Prompt:

 Have you ever been in a situation where work conflicted with a personal obligation? How did you handle it? Why is it important to maintain professionalism and integrity when personal and work obligations collide?

2. Direct Instruction (15 minutes)

Objective:

• Explore the possible actions JoAnne can take in this situation, and analyze the pros and cons of each option.

Activity:

- Present the 4 Options JoAnne Could Take:
 - A. Tell Laura that in fact there has been an emergency.
 - *Discussion:* Why is this the worst choice? What are the consequences of lying to an employer? How does dishonesty affect trust and credibility in the workplace?
 - o B. Explain the real reason for needing to leave and ask to leave again.
 - *Discussion:* Why is this not the best choice in this case? Even though it's important to communicate openly with your employer, continuing to push the request after being told no may cause unnecessary tension and be seen as unprofessional.
 - C. Plan on getting to the game late.
 - *Discussion:* Why is this the best option? What does it mean to show flexibility and professionalism? How can adjusting expectations help maintain balance between work and personal commitments?
 - D. Offer to find someone to cover for you.
 - *Discussion:* While offering to find coverage might seem like a helpful solution, why is it not appropriate in this case? The supervisor has already explained the importance of the meeting, so finding coverage won't solve the underlying issue.

Key Concept: In situations where work conflicts with personal life, it's important to maintain professionalism, be flexible, and consider the long-term impact of your actions. Respect for your employer's needs, clear communication, and maintaining integrity are essential.

3. Group Discussion and Role-Playing (20 minutes)

Objective:

• Help students practice decision-making, effective communication, and professionalism in managing work-life conflicts.

Activity:

- Divide students into pairs or small groups.
- **Role-Playing:** One student will play JoAnne, the other will play the supervisor. The scenario should unfold as follows:
 - JoAnne needs to leave early for a personal event, but the supervisor has explained that the mandatory meeting prevents early departure.
 - JoAnne should ask for permission to leave early and explain her situation, then respond to the supervisor's refusal.
 - o Afterward, JoAnne should demonstrate flexibility, possibly adjusting her plans to attend the game late.
- After 5 minutes, students switch roles and repeat the scenario.

Debrief:

- Discuss the different strategies students used to handle the situation. How did they maintain professionalism while managing their personal and work obligations?
- How did they approach communicating their needs and respecting the supervisor's decision?

4. Concept Reinforcement (10 minutes)

Objective:

• Emphasize the importance of flexibility, professionalism, and integrity in balancing work and personal life.

Activity:

- Lecture and Discussion: Highlight the following key points:
 - There will be times when work will conflict with personal life. In these situations, it's important to remain professional and flexible.
 - Maintaining integrity is crucial. Lying or dishonesty can lead to loss of credibility and trust,
 which can have long-term consequences.
 - Understanding the needs of your employer while balancing personal commitments is an important part of career growth and professional development.
 - When a request is denied, it's important to assess the situation objectively, adjust plans where possible, and move forward with professionalism.

Real-life Example: Share an example where a situation like JoAnne's occurred, and how maintaining professionalism and integrity led to a positive outcome, even when personal needs couldn't be fully met.

5. Reflection and Conclusion (5 minutes)

Objective:

• Encourage students to reflect on the key takeaways from the lesson and how they can apply these skills in real-world situations.

Activity:

- Reflection: Ask students to reflect on the following questions:
 - Have you ever faced a situation where work interfered with personal commitments? How did you handle it?
 - o What does it mean to handle a work-life conflict with professionalism and integrity?
 - How can you be flexible and maintain balance between personal and professional responsibilities?
- **Conclusion:** Reinforce that navigating work-life conflicts requires professionalism, clear communication, and integrity. Flexibility is important, but honesty and respect for both personal and work commitments are key to maintaining good standing in the workplace.

Assessment:

- **Ongoing Observation:** During role-playing, observe students' ability to communicate professionally, handle conflicts, and demonstrate flexibility.
- **Final Discussion:** Assess how well students articulate the importance of maintaining integrity and professionalism in balancing work and personal commitments. Evaluate their understanding of why option C (planning on getting to the game late) is the best choice.

Materials Needed:

- Whiteboard/flip chart for listing discussion points.
- Printed copies of the situation and options for students to refer to.
- Role-play scenario cards.

Additional Notes:

- **Customization:** Adapt the lesson to fit specific work environments or challenges related to balancing personal and professional responsibilities.
- **Follow-up:** Consider offering a follow-up session or case study where students can discuss strategies for balancing work and family life in more complex scenarios.

Soft Skills Lesson Plan: Scenario 13: Demonstrating Initiative and Leadership in the Workplace - From the eWORKs Lessons Library

Note: This lesson includes an optional two-minute video of the workplace scenario described below in Section 3. The video is one of nine short videos of workplace scenarios found here:

www.Accutalent.com/workforce/admin/resourcecenter/casas/recording/wrs_trainingvignettes.mp42.

The videos are in English but when played on Google Chrome, they can be played with subtitles in various other languages.

For more information about eWORKs and other eWORKs resources, please email eWORKs@casas.org.

Lesson Plan

Objective:

- **Primary Goal:** Help students understand the importance of initiative, commitment to quality, and self-management in a work setting, particularly when providing assistance to coworkers.
- Skills Focus: Initiative, self-management, leadership, problem-solving, commitment to quality.

Target Audience:

• Employees in environments where teamwork and assistance are critical, such as retail, healthcare, or customer service industries.

1. Introduction (10 minutes)

Objective:

• Introduce the situation and set the stage for discussing the importance of initiative, self-management, and helping coworkers in a workplace.

Activity:

- Present the Situation:
 - Justina and Mark work in a pharmacy. They've both been trained on a new prescription dispensing machine by their Supervisor. The Supervisor encourages them to use the new machine to learn quicker, though the old machine is still available if needed. When an order comes in, Justina is struggling to operate the new machine. What should Mark do?

Discussion Prompt:

- Have you ever been in a situation where a coworker needed help? How did you respond?
- Why is it important to not just focus on your own tasks but also help others when necessary?

2. Direct Instruction (15 minutes)

Objective:

• Examine the different options Mark can take in this situation, discussing the pros and cons of each option.

Activity:

- Present the 4 Options Mark Could Take:
 - A. Offer to fill the order and let Justina watch. Suggest that Mr. Smith can give her more training later.
 - Discussion: Why might this option seem helpful, but ultimately be insufficient?
 While Justina may learn by observing Mark, this doesn't empower her to learn how to use the new equipment herself. Plus, it shifts the responsibility to Mr. Smith for further training.
 - B. Tell Justina to use the old equipment for now and ask Mr. Smith to give her more training later.
 - Discussion: Why is this the worst choice? Although this ensures the order is filled, it
 avoids the opportunity to help Justina grow and learn the new equipment. This
 choice also removes the chance to demonstrate leadership and proactive behavior,
 as it passes the responsibility to someone else.
 - C. Offer to train Justina on how to use the equipment and let her fill the order using it.
 - Discussion: Why is this the best option? By offering to train Justina on the new equipment, Mark demonstrates leadership, initiative, and commitment to quality. Justina learns, the order gets filled, and Mark shows his ability to take charge and support a colleague.
 - o D. Offer to fill the order and then ask Mr. Smith if you can train Justina later.
 - *Discussion:* Why is this a somewhat good choice but not the best? While it shows some initiative by filling the order and planning for training, it misses the opportunity to take immediate action and help Justina learn in real-time.

Key Concept: Taking initiative and supporting coworkers not only helps them but also shows leadership and self-management. Supervisors appreciate employees who demonstrate proactive behaviors and commitment to quality.

3. Group Discussion and Role-Playing (20 minutes)

Objective:

Practice the skills of helping a coworker while balancing responsibility and leadership.

Activity:

- Divide students into pairs or small groups.
- Role-Playing: One student will play Mark, and the other will play Justina. The scenario should unfold as follows:
 - Justina struggles to use the new prescription dispensing machine.
 - Mark must decide whether to train Justina, allow her to observe, suggest she use the old equipment, or pass the responsibility to someone else.
- After 5 minutes, students will switch roles and repeat the scenario.

Debrief:

- Discuss the strategies used in the role-play. How did Mark approach the situation? Did they demonstrate leadership and initiative in helping Justina learn?
- How did the students feel when they helped someone in real-time versus simply delegating the task?

4. Concept Reinforcement (10 minutes)

Objective:

• Emphasize the importance of demonstrating initiative and leadership in the workplace, particularly when helping colleagues.

Activity:

- Lecture and Discussion: Discuss the following points:
 - The value of taking ownership of a situation and offering to assist others when they need help. This shows initiative and a commitment to the success of the team.
 - Supervisors appreciate employees who are proactive and take on leadership responsibilities, even if it's in a small way.
 - Demonstrating the ability to assist coworkers not only helps them but also improves the quality of work and overall productivity.
 - There are many ways to show leadership, such as helping a coworker solve a problem, improving team communication, or taking on additional tasks when needed.

Real-life Example: Share an example where an employee took initiative to assist a coworker or helped solve a problem without being asked, and how that demonstrated leadership.

5. Reflection and Conclusion (5 minutes)

Objective:

• Encourage students to reflect on their learning and how they can apply initiative and leadership in their own work.

Activity:

- Reflection: Ask students to reflect on the following questions:
 - o Have you ever taken initiative to help a coworker? What was the outcome?
 - Why is it important to balance helping others with completing your own tasks?
 - How can demonstrating leadership in small moments improve the overall work environment?
- Conclusion: Reinforce the importance of being proactive, taking responsibility, and showing leadership in the workplace. Employees who demonstrate initiative and commitment to quality contribute to a positive work culture and are often recognized for their contributions.

Assessment:

- Ongoing Observation: During role-playing, observe students' ability to demonstrate leadership, initiative, and problem-solving in helping their coworkers.
- **Final Discussion:** Assess students' understanding of why option C (offering to train Justina) is the best choice and evaluate how they plan to apply these skills in their own work environments.

Materials Needed:

- Whiteboard/flip chart for listing discussion points.
- Printed copies of the situation and options for students to refer to.
- Role-play scenario cards.

Additional Notes:

- **Customization:** Adapt the lesson to fit specific roles or work environments where employees are expected to help colleagues (e.g., healthcare, customer service, retail).
- **Follow-up:** Consider providing additional case studies or scenarios where students can practice helping others in real-time and demonstrating leadership in different situations.