

SOLUTION: The ITs of Customer Service

Many businesses consider great customer service a key business strategy. They want their customers to use their services again, refer their services to others and to talk positively about them in their communities.

As a professional training and consulting company, we often get requests from organizations for “customer service training” – most specifically, organizations are requesting front line employee training. Yet, more than twenty years of working in healthcare to improve patient satisfaction has taught us that “Training for IT”

(“IT” being high customer satisfaction) is only one of the many “ITs”. Our experience has also shown us that if an organization only invests in the “Training for IT” without addressing the other “ITs”, there will likely not be sustainable results – leading to little (or no) return on the investment of training. Since our company’s purpose is to help our clients get great results that provide a return on their investment, we work with organizations on a broader plan - one that incorporates more “ITs”. So, let’s explore some of the “ITs” of great customer service.

SET STANDARDS FOR IT.

Some organizations need to start with the basics of setting specific standards regarding Customer Service. Even in those organizations that have Behavioral Standards or Customer Service Standards, we often find that they are not “alive” in the organization; meaning, they are often a document in an Employee Handbook or a policy – yet not really guiding the day-to-day actions of the employees. As a first step, we recommend that an employee team create (or re-create) Behavioral Standards that include customer service standards. An example of a standard in a hospital might be: “walk people where they need to go”. Another example of a standard may be “answer the phone in three rings and provide the company’s scripted greeting”. Getting specific helps employees understand what is meant by providing great customer service. We also recommend that organizations provide their applicants with a copy of the Behavior Standards and require that the applicant sign a commitment to the organization’s Behavior Standards prior to even being invited



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for an interview. Organizations can also have Behavior Standards' compliance as an element of the annual performance appraisal and conduct annual self-assessments.

HIRE FOR IT.

If customer service is important to the success of your business, it should be a key element in your selection process. There are standardized behavioral pre-employment tests that can evaluate candidates on their customer service aptitude. Often, we “hire for skill” and then think we can “train for service”. The opposite may often be more successful: hire for customer service aptitude and train to job skill. Applicants should be asked behavioral based interview questions that require the applicant to provide very specific examples of how they have handled actual customer service challenges. By requiring applicants to commit to behavioral standards, screening for service aptitude and asking service-related behavioral based interview questions, the applicant will start to understand the company's expectations regarding excellent service before their first day on the job.

TRAIN TO IT.

It may not be the only thing that you do, but you definitely must do it. Training staff regarding customer service is a must-have if you want to set your employees up to succeed. Staff training should focus on practicing – practice makes permanent. Training is just not about who, what, when and where to do it – but about actually practicing how to do it. Role playing scenarios and videotaping scenarios are helpful teaching aids. Also, storytelling by your employees can create powerful learning experiences for others. Training sets your employees up for success – set the expectations and thoughtfully train employees to meet and exceed them.

VALIDATE IT – VERIFY IT.

Once you've set standards and have trained your staff regarding service expectations and standards, you need to make sure that it is really happening. If you have a standard that phone calls are answered in three rings; you must have a mechanism to validate that it is really happening. One way to do this is through “Rounding”. Rounding is a technique that expands the concept of “management by walking around” to more purposeful observations and interactions between a leader and employees. During leader rounding, observations can be made, and conversations can be had with employees to observe best practices and to identify any barriers to the standards being met. It provides an on-the-spot opportunity for recognizing staff



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for meeting the customer service standards; and, also an opportunity to coach to the standards that aren't being met.

With some standards, there may be a way to capture data through technology; if so, then you have another way to validate if the standard is being met. For example, in a hospital, there may be a service standard to respond to all patient call lights within two minutes. In these situations, most call-response technology systems have software that has report capabilities to track call light response data. Data, when possible, is a great validation tool.

What you accept is what you teach. What you permit, you promote. Therefore, leaders need to be validating and verifying to make sure that what is expected is what is actually happening.

MODEL IT.

Leaders, formal or informal, must model the established customer service standards. If leaders are not following the standards, it is highly unlikely that other employees will. Leaders cannot be too important or too busy to do what is expected of everyone in the organization. An example that I can provide from my hospital days is related to a service standard to "walk people where they need to go". On a certain Monday morning, during a time of major construction at the hospital, I found a lost outpatient in a distant parking lot needing to find his way to the laboratory. I was coming to work that day loaded down like a pack mule. I had a large bag packed with lunch for my co-workers and also had my overstuffed briefcase and purse. And now, I have a patient who needs to be taken to the laboratory – a very long walk from where we were (...and not in the direction of my office). However, there was no question in my mind that I was going to walk this person to where he needed to go. My doing so, created a very visual example to every employee who passed the patient and I in the hallway.

MEASURE IT – SET GOALS FOR IT.

What gets measured and monitored gets improved. Organizations that are serious about service, measure it. They also set goals for increasing it.

The first step in setting a goal for service is making sure you have a measurement system – a goal without a measurement system is much less effective. If you can't measure it; the current situation and the future situation are subjective feelings regarding how well, you are doing. Subjective measurements can be wrong and may mislead you into believing that you are doing well, when you are not. An example of misleading subjective information can be made regarding health. You may subjectively think that you are healthy. You



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are eating a balanced diet and you are exercising daily. Yet, you get some laboratory data that shows that your blood count is very abnormal. Without the measurement of the blood count, you were misled regarding your perceived excellent health. There were actions you needed to take to improve your health; but you didn't even know it when you were without the objective measurement.

It is recommended that organizations set annual goals. Once the organization sets its' goals; then the various departments set goals in alignment with the organization's goals. This creates synergy and alignment within the organization. Research conducted by FranklinCovey has shown that if an organization sets 2-3 goals, they will likely achieve 2-3 goals. If your organization's future success depends on excellent customer service, then a service goal must be one of the organization's goals. Metric-based goal setting is recommended, and organizations should investigate and adopt an annual process for metric based goals in alignment with their Strategic Plan.

EVALUATE FOR IT.

This can be most easily accomplished if the organization has a metric based goal system. In these organizations, the metric based goals can be the basis for the annual performance evaluations. For instance, in some organizations, the senior leadership team members (CEO and all VPs) have 100% of their annual performance evaluations based on the actual achievement level of the two or three metric-based organizational goals. In one hospital example, the senior leaders were evaluated on the following three goals: Improve days-cash-on-hand by 4-6 days; improve 14 customer service measurements by 2% or more over the prior year; and to improve 8 quality measures to 98% or higher average compliance for the year. This alignment and evaluation system provided a new sense of teamwork and collaboration amongst the leadership. In this example, the CFO was just as responsible for customer service and patient care quality as the nurse executive. As well, the nurse executive is just as accountable for the days-on-cash goal as the CFO.

At the employee level, metric based goals can also be part of the annual evaluation process. For example, a hospital's evaluation could be set up in the following way: 20% of the evaluation based on Behavior Standards compliance; 20% based on how the employee performs their job tasks; 40% based on the level of accomplishment of their department's metric-based goals and 20% based on the level of accomplishment of the organization's goals. The first 40% is based on subjective evaluation of the individual's behavior and performance and the latter 60% of the evaluation is the objective measurement of the employee's contribution toward organizational goals.



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LEAD IT.

This “IT” is a specific appeal to the owner or CEO of the company. There is no substitute for the CEO’s role in leading service initiatives. If the CEO is not continually communicating the organization’s priority and strategy for service excellence, the employees are not going to behave like it’s a priority. Others in the organization certainly have important and contributing roles in service excellence; however, the CEO’s communications to the employees have a unique and powerful appeal. Suggestions for CEOs: provide a monthly written communication to all employees which updates the employees on the current customer service results and the continued emphasis that service is a key strategy. Provide recognition and special stories of excellence service. CEOs can round in the organization and provide recognition for examples of excellent service. CEOs should be part of new employee orientation to communicate the behavior/service standards. Quarterly employee forums can provide the CEO an opportunity to communicate to employees in person – service must be a topic.

CELEBRATE IT.

What gets recognized gets repeated. To keep service standards positively embraced in your organization, we recommend you follow the 3:1 ratio. Meaning, positive feedback/recognition for service excellence should be three times more prevalent than coaching/constructive conversations. As you are measuring service results and see trends in improvement and/or meet a quarterly or annual goal, take time to celebrate the results. Don’t just celebrate the numbers, celebrate the meaning behind them numbers (e.g., our patients are telling us that they see an improvement in our communication; our patients are telling us that they are more likely to definitely recommend our services to others than they were 6 months ago, etc.). Another way to recognize great service is to create programs for employee-to-employee recognition and patient-to-employee recognition. Your organization’s Patient Experience Team or Best Places to Work Team would be great at developing such programs.

Patients deserve excellent quality and service. If your hospital has been training for IT; yet service excellence is not happening, we encourage you to consider the other “ITs” of customer service. Also, fair warning: it doesn’t happen fast – and it doesn’t “just happen”. Excellent customer service is a long-term strategy and commitment – and over time becomes “how you do your work” not “extra work”. We wish you well on your journey to excellent service.



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