

*Thank you for attending*

# ***The Culture of Customer Service***

*A Live and Archived Teleconference*

*Session 1 in the "Customer Service for Community Health Centers" Series*

*Target Audience: Human Resources Staff and Other Managers*

*Sponsored by Community Health Association of Mountain/Plains States (CHAMPS)*

*Presented by Lisa Mouscher on Wednesday, June 10, 2009*



## **Supplementary Information Packet**

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## **LEARNING OBJECTIVES**

This teleconference will address:

- The Critical Nature of Customer Service in Health Care
- Defining a “Culture of Customer Service”
- Customer Service Best Practices for Managers: Hiring, Training, and Walking the Talk
- Standards, Policies, and Procedures: Guidelines and Guideposts
- The Role of Accountability: the Key to Success

*This event supports strong program management at Region VIII Community, Migrant, and Homeless Health Centers (CHCs) by **addressing the following HRSA Health Center Program Requirements:***

- *Services – Required and Additional Services*
- *Services – Staffing Requirement*
- *Management and Finance – Key Management Staff*

## **BIOGRAPHY OF LISA MOUSCHER**

Lisa Mouscher is an Organizational Learning Facilitator at Integrated Work Strategies. Her background includes 15 years as a facilitator, trainer, and coach in areas including leadership and staff development, organizational change, service excellence, and Human Resources. In addition, she has worked as a manager and leader in a variety of industries in both the for-profit and non-profit sectors, enabling her to bring a fresh perspective that integrates a wide range of approaches. Ms. Mouscher holds a Bachelor's degree in Business Management from Lesley University, and is licensed to deliver the Adversity Quotient™ Program, the world-class training program to develop organizational and individual resilience. For more information about Integrated Work Strategies, please visit [www.integratedwork.com](http://www.integratedwork.com).

## **DESCRIPTION OF CHAMPS**

CHAMPS, the Community Health Association of Mountain/Plains States, is a non-profit organization dedicated to supporting all Region VIII (CO, MT, ND, SD, UT, and WY) federally-funded Community, Migrant, and Homeless Health Centers (CHCs) so they can better serve their patients. Currently, CHAMPS programs and services focus on education and training, collaboration and networking, policy and funding communications, and the collection and dissemination of regional data for Region VIII CHCs and Primary Care Associations (PCAs). For more information about CHAMPS programs and services, please visit [www.champsonline.org](http://www.champsonline.org) or call (303) 861-5165.

## **SESSION 2 IN THE “CUSTOMER SERVICE FOR CHCS” SERIES**

Please join us for the second session in the “Customer Service for Community Health Centers” series, scheduled for Wednesday, July 22, 2009 from 11:30 AM – 1:00 PM Mountain Time. ***Customer Service: The Art of Caring*** is a live webcast targeted at all health center staff and board members, and will include an interactive question and answer session. This event will take place online, and advance registration is required at least 24 hours before the event. Handouts and log-in information will be emailed to all registrants the day before the webcast. For more information about topics, CME credit, and cost visit [www.champsonline.org/Events/Distance\\_Learning.asp#CustSvcALL](http://www.champsonline.org/Events/Distance_Learning.asp#CustSvcALL).

Please register online:

<https://comp08.eventcenterlive.com/cfm/ec/register/reg.cfm?BID=1&RegID=E8B6A8DC>

## **PRESENTATION OUTLINE**

Contents:

- I. Welcome and Introduction
- II. The Critical Nature of Customer Service in Health Care
- III. Creating a Culture of Customer Service: Description and Steps
- IV. Hiring for Customer Service Excellence
- V. Accountability

### **I. Welcome and Introduction**

Role of managers in creating a culture of Customer Service

- Changing organizational culture doesn't happen overnight
- Takes time, commitment, teamwork, and reminders
- Takes holding people accountable

### **II. The Critical Nature of Customer Service in Health Care**

Effects of Customer Service:

- Patient mood
- Patient outcomes
- Health of patients
- Success of the health center

All are directly affected by the service decisions made with each and every interaction with customers.

If health care customers don't feel comfortable:

- They may not make the decision to walk in the door
- They may not talk openly with you
- They may not get the care they need in the timeframe they need it

Great Customer Service leads to trust, which leads to:

- Higher rates of treatment compliance
- Lower infection rates
- Lower mortality and morbidity

Customer service statistics:

- Less than 30% of customers who are dissatisfied make a complaint
- Each dissatisfied customer tells an average of 11 people about their experience
- Customers need to have 12 positive experiences to overcome one negative experience

Additional benefits of exceptional customer service:

- Improved customer outcomes
- Increased patient retention, loyalty and growth
- Greater success with accreditation and regulatory agencies
- Differentiation of your health center from the "other guys"
- Decreased time lost dealing with escalated issues
- Reduced or eliminated litigation costs
- Increased employee satisfaction, retention, and productivity

### **III. Creating a Culture of Customer Service**

Challenges to instilling excellent customer service:

- Staff members can have things going on in their own lives
- They may not know how to handle situations in a service-oriented manner
- They may not understand the importance
- They may not think that they have to, and may not bother

Customer Service must become part of the fabric of the organization's culture; it must:

- Be something tangible
- Be talked about
- Be reinforced
- Have policies behind it
- Be trained about
- Must be something staff is held accountable for
- Be something the entire organization believes in and supports

How do you begin to make this happen?

- Define what a Culture of Customer Service means to you and to your organization
- Be willing to be a change agent
- Determine who, if not you, is the right person to put a program in place
- Ask the questions we're putting forth today

Remember both Internal and External Customers

- Internal: coworkers and others that we work with
- External: our patients and others
- Customer service applies to the way we treat each other internally as well as the way we treat our customers externally

When taking steps toward Creating a Culture of Customer Service

- Create an organizational definition of Customer Service (what does it mean specifically to your organization?)
- Ensure the top levels of the organization understand its importance and have a commitment to making it happen
- Identify what customer service means on a daily basis for each staff member
- Address customer service in your mission statement, values statement, or in a policy statement that says Customer Service is non-negotiable in the organization
- Create policies and procedures addressing how to handle situations in a customer-oriented way
- Provide training to make sure everyone knows how to do it, talk about it in staff meetings, have those who succeed provide training to other staff
- Hold staff accountable when they fall short
- Recognize and reward people who do it well
- Instill an organization-wide understanding and passion to have every interaction possible end with a positive outcome for BOTH the health center and the individuals involved

In a Culture of Customer Service, every staff member:

- Understands the responsibility to treat each and every person they come across in their work day like they would want to be treated
- Understands the responsibility to treat everyone like the most important person that they will deal with that day
- Asks themselves, "How can I make a positive difference in the life of this person, even if only for a minute?"

- Puts themselves in their customer's shoes for every interaction
- Remembers to think about their customer as a PERSON and an individual
- Knows the importance of making a decision that is respectful and honoring of the person in front of them at that moment

Ongoing training allows staff to know how to work within the Culture of Customer Service:

- By your actions, by what you model
- By the actions of your leaders
- Through staff meetings and classes
- Through individual coaching
- By giving positive feedback when they do it right
- By letting them know when they don't do it right
- By helping them come up with a better answer for the next time
- By not accepting less than excellent customer service from anyone

### **Summary - the First Step: Creating Organizational Commitment**

- If you're not the decision maker, talk to the people who are
  - Discuss the importance of a culture of customer service with HR, your CEO/ED, etc.
  - Encourage leadership to help you champion organizational changes
- Look to see where providing great customer service is mentioned in writing:
  - Mission statement, values statement, etc.
  - If not, think about how you could influence making that happen
  - If necessary, craft a simple, clear, concise statement about your Health Center's commitment to customer service can be rolled out at a staff meeting by the leaders and posted on your walls (or, rolled out within your department)

### **Summary - the Second Step: Policies and Procedures**

- If they already exist, pull them out, review them, and make sure they are still relevant
  - Post the approved policies and procedures, discuss them at manager level meetings, discuss them with staff
  - Train staff to adhere to policies and procedures
- If you do not have policies and procedures in place, create some
  - Research online resources
  - Research Service Excellence in health care
  - Talk with other managers in your organization who may have experience implementing service excellence programs
- When you're creating or deepening policies, standards and procedures, consider:
  - What are the desired outcomes? What would each of our daily interactions look like in a perfect world?
  - How is it working now? What works--what doesn't work?
  - How do we know what works now? Have we asked our customers--both internal and external? Do we know what we do well and what we don't? Do we hold regular surveys or focus groups?
  - What are the most major issues for our customers? How can we address those first?
  - How would it look if we did this in a way that actually **enhanced** the customer experience, and what does that mean for both internal and external customers?
  - Remember that good standards are simple and straight forward.

Selected examples of customer service standards from Cincinnati Children's Hospital:  
(<http://www.cincinnatichildrens.org/visit/stay/standards.htm>)

- Be polite, friendly, and welcoming when we communicate--in person, in writing, by phone, fax, or email.
- Respect differences in values, cultures, beliefs and ages, and include our awareness of diversity into our daily practice.
- Respect the dignity of all and show empathy and consideration in our daily practice.
- Listen and respond in an attentive way to client inquiries
- Protect the confidentiality of information
- Acknowledge clients by name
- Always introduce ourselves by name and add title or role if appropriate.
- Wear our badges so they can be easily seen and read
- Dress appropriately according to the organization's dress code and
- Maintain a clean and safe environment for co-workers and clients.

### **Summary - the Third Step: Training and Reinforcement**

- Training can be formal and informal
- Consider a kick-off for a new initiative, or to reinforce an existing initiative
- When training, be specific:
- Use examples, do role plays, discuss every imaginable situation.
- Enforce that excellent customer service is important, and a way of life at your health center
- Model the behavior you expect
- Tell the stories, catch people doing it right
- Reinforce excellence

### **IV. Hiring for Customer Service Excellence**

Hiring is the perfect time to ensure that you get someone who will provide excellent service

- Try using Behavioral Questions when interviewing
  - Questions that give you information about how someone has actually performed in situations in the past, rather than how they want you to think they would perform
  - Phrased in such a way that the candidate has to give you information about things they have done
  - With each question, you're looking for a specific time when they dealt with the particular situation, how they handled it, and what the outcome was

Non-Behavioral vs. Behavioral Questions for Interviewing

- Instead of, "What would you do if..." or, "How would you handle this..."
  - Try, "Tell me about a specific situation when you...", "What was the situation?", "What actions did you take?", and "What was the result?"
- Candidates will tend to give vague or general answers such as "Oh WE did.... Or "I always" or "In that situation, I would..."
  - Follow up saying something like, "Great. What was YOUR role in that?" or "Tell me about a specific situation when you were dealing with that."

Sample Behavioral Questions:

- "Tell me about a time when a patient really crossed the line and was extremely rude. How did you handle it? What was the outcome?"
- "Tell me about a time when a customer/patient really pushed your buttons and you knew they were getting to you. How did you handle it? What was the outcome?"

- “Tell me about the toughest customer/patient interaction you ever had. How did you handle it? What ended up happening?”
- “Tell me about a time you had a difficult interaction with a co-worker. How did you handle it? How did you get along in the future?”
- “Tell me your greatest service success story with a customer/patient.”
- “Tell me about a time when you had a situation with a customer you wish you had handled differently.”

After Hiring:

- Customer Service training should be a part of the New Hire Orientation
- Provides understanding of the organization’s customer service culture, expectations, policies, procedures, etc.

## **V. The Role of Accountability**

Holding staff accountable is critical to achieving service excellence.

- Service excellence is an expectation
- However, do not expect perfection
- Expect an understanding of expectations, and a following of expectations most of the time
- Do not ignore mistakes
- Ensure policies address how to handle mistakes, based on significance, recurrence, etc.
- Consider installing a Performance Management system with specific goals for each person
- Those goals should be specific, measurable, reasonable, and timely; every staff member should have a service excellence goal
- Goals can be monthly, quarterly or annual; review and rate them regularly
- Reward those who meet or surpass expectations, then raise the bar

Encourage staff members to hold themselves accountable, asking with each interaction:

- “What can I do to make a positive difference in this person’s life, in this situation, at this moment?”

Review and complete “The Accountability Challenge” (pages 8-13 of these handouts)

- Provides a framework for looking at the accountability you currently have at your health center
- Identifies five qualities held by accountable organizations
  - The Ability to Recreate Itself
  - Clear Direction and Expectations
  - Accountable Staff Engagement
  - Supportive Environment for Challenging Others
  - Gratitude and Celebration Replaces Traditional Recognition
- Provides assistance putting greater accountability in place

## THE ACCOUNTABILITY CHALLENGE

*“Accountability is the basis for having an environment of trust, support, and dedication to excellence... With accountability, people can depend on each other and don't have to worry about doing extra work because others failed to keep their agreements.”*

*Mark Samuel, Creating the Accountable Organization*

Accountable organizations have many advantages, but they happen only when employees at all levels are committed to creating and maintaining an environment of accountability. Mark Samuel, author of *Creating the Accountable Organization*, has identified six qualities that are critical to Accountable Organizations. These qualities are listed below, as well as related questions to help you evaluate the overall accountability of your organization and next steps you may choose to champion or implement.

To complete this exercise, read the explanation of each quality and discuss the related questions. For each question, brainstorm Best Practices that are both realistic and actionable, and be prepared to share your ideas with the larger group.

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### Quality #1: The Ability to Recreate Itself

Accountable organizations are able to change strategies quickly and seamlessly. They know where they've been, understand where they need to go, and develop their employees appropriately to help reach the organization's long-term and short-term goals.

#### **Actions for Success**

- How are you ensuring that your staff members are growing their skills and putting the learning to work in a way that will improve the quality of the customer service provided by each individual?
  
- What can you do in the future to hold your employees accountable to moving their skill-set forward?

## **Quality #2: Clear Direction and Expectations**

Accountable organizations have a clear vision, mission, and values that are part of every decision that is made. Goals and expectations for the organization, teams, and individuals are driven by the spirit and the essence of these documents. They are publicized, they are understood, and they are lived by.

Organizational goals drive department goals. Department goals drive individual goals. They are clear, written, timely, specific, measurable, challenging, and attainable. In accountable organizations, everyone knows what's expected of them, by when, and why. There's a process for staying on track, knowing when you're off track and implementing course correction when needed.

### **Actions for Success**

- Does your organization have a clear vision and expectations surrounding customer service? If not, how can you ensure that these are created and communicated?
- Do your staff members each have clear, actionable goals regarding the provision of customer service that support the organizational goals and expectations? If not, how can you begin the process of creating them?
- Are your managers/supervisors holding regular check-ins with your staff members? If so, are you truly holding your staff members accountable and how? If not, how can you hold them accountable going forward?
- If goal achievement is not on target, are you finding out the reasons why? If so, what action do you take? Do you offer support to help the individual to achieve the goals? Are there consequences if goals/targets are continuously missed?
- Are you celebrating your staff member's successes (when they are on target or beyond) as an organization and/or individually? If so, how? If not, how can you do this going forward?
- Has your organization communicated their "vision of success" in a consistent and ongoing manner – using it as a compass for change efforts, major decisions, and continuous improvement? If not, what can you do to help make this happen? Be specific!

### **Quality #3: Accountable Staff Engagement**

Staff engagement is a critical part of highly accountable organizations. These organizations gain input from staff members for many purposes including planning and resolution of challenges. The input is listened to, considered, and utilized whenever appropriate. This practice has the potential to improve staff member's sense of ownership, trust, morale and productivity, as well as organizational outcomes.

#### **Actions for Success**

- How are you facilitating staff member involvement and engagement in the customer service process? If you are not actively involving the staff at this time, what can you do to help facilitate this?
- Are your staff members involved in meaningful decision making? Are they empowered, included, placated, left out, or put off? What can you do to help create able, capable, empowered, employees?
- How do you make it safe for staff members to raise issues in a way that supports a positive environment, focused on solutions? What can you do to support this going forward?

## **Quality #4: A Supportive Environment for Challenging Others**

Accountable organizations put a great deal of effort into creating a culture and work environment in which staff members feel safe to make mistakes, surface potential or current problems and work through conflicts. Environments with these attributes allow staff members to take appropriate risks, knowing that they may occasionally fumble the ball on their way to reaching and surpassing the end goal.

When teams or individuals are not the best that they can be, accountable organizations raise the issues openly so they can be improved or resolved. Rather than pointing out someone's faults or placing blame, the delivery conveys the message that the organization is dedicated to helping each person realize their highest level of capability. This is not just lip service--it is the way feedback and professional development are carried out, day in and day out. At all levels, people are continually challenging each other to reach for and achieve higher levels of excellence. This type of environment can be fun to work within, and employees often stretch further and achieve more than they knew possible.

### **Actions for Success**

- What have you done to create an environment in which staff members feel supported and safe to challenge each other and raise issues? What can you do to increase this going forward?
  
- How are people inspired and challenged to achieve their potential capability and raise the bar on their own performance and communication? What can you do to increase the possibility that this will occur?
  
- Does each person have a personal vision of excellence that they are committed to attaining beyond job expectations? Do they know what it would look like if they were doing the best job possible? If not, how can you facilitate that?

## **Quality #5: Gratitude and Celebration Replaces Traditional Recognition**

Accountable organizations create an environment in which gratitude and celebration are part of daily life. Thank yous are given freely and often when staff members contribute to the organization's success. Commitment, integrity, performance, collaboration, and teamwork are openly valued and appreciated. Acknowledgement goes up, down and across levels, and thank yous and celebrations for effort, support, and results are plentiful.

A culture of gratitude and celebration leads to an organization in which team members feel valued and respected. Absenteeism and turnover go down, productivity goes up, and the workplace is a nice place to be.

### **Actions for Success**

- How do you celebrate your wins and the wins of others, whether the wins are achieving goals and high standards of performance or making improvements? How can you do this going forward?
  
- How do you convey each person's value and contribution on a regular basis? How can you do this going forward?

## Summary

Accountable organizations are not perfect, but they address issues in ways that enable them to move forward while remaining true to their vision of success.

It takes courage and dedication to create and maintain an accountable organization. Staff members need to be dedicated to both personal and organizational excellence, and the organization needs to support the professional growth and development needed to pursue their current and future vision.

In an accountable organization there is integrity, open communication, respect, a focus on successful problem solving, professional development, a commitment to reaching goals and raising the bar, and regular, meaningful gratitude and celebration. An environment of learning, trust, self-confidence, and accountability is an environment where employees will strive for success.

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**Now that you've worked through this exercise, you are ready to take on the challenge. Think about your organization and answer the following questions:**

- What are the missing links to high performance in customer service in my organization?
- How can we better anticipate and respond to key challenges in customer service?
- What are the root causes preventing performance improvement in the area of customer service?
- How can we build a more accountable culture to ensure that we provide outstanding customer service, both internally and externally, with every interaction?

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**Take the time...**

**Create a plan...**

**Accountability is key to ensuring  
*outstanding* customer service.**

## **ADDITIONAL RESOURCES: CUSTOMER SERVICE FOR HEALTH CARE**

### ***Selected Sample Customer Service Standards and Policies***

#### **Cincinnati Children's**

Customer Satisfaction Service Standards at Cincinnati Children's, built around the CARES program (Courteous, Attentive, Respectful, Enthusiastic, and Safe)

<http://www.cincinnatichildrens.org/visit/stay/standards.htm>

#### **FirstHealth of the Carolinas**

Customer Service Standards, built around all interactions, face-to-face interactions, telephone interactions, and facility/environment

[http://www.firsthealth.org/Career%20Opportunities/cs\\_standards.htm](http://www.firsthealth.org/Career%20Opportunities/cs_standards.htm)

#### **Medscape Today from WebMD**

Creating a Customer Service Culture, includes first impressions, telephone policies and procedures, and speeding the appointment process (free registration required)

[http://www.medscape.com/viewarticle/408320\\_3](http://www.medscape.com/viewarticle/408320_3)

#### **North Carolina Department of Health and Human Services**

Customer Service Policies and Procedures, including purpose, policy, implementation, definitions, and data collection and reporting

[http://info.dhhs.state.nc.us/olm/manuals/dhs/pol-30/man/Customer\\_Service.pdf](http://info.dhhs.state.nc.us/olm/manuals/dhs/pol-30/man/Customer_Service.pdf)

#### **Office for Oregon Health Policy and Research**

Business plan for 2006-2011 including strategies, actions, and measures for providing excellent customer service

<http://www.oregon.gov/DAS/docs/businessplans/OHPR-final.doc>

#### **Office of Management Assessment, National Institutes of Health (NIH)**

NIH Customer Service Plan, including principles, standards, future efforts, and more

<http://oma.od.nih.gov/ma/customer/customerserviceplan>

### ***Additional Customer Service in Health Care Resources***

#### **The Quality Patient Experience**

Website containing "Concrete, Sustainable Solutions for Your Healthcare Team", including information about and free tools for leadership development, patient experience skill training, nurse communication, the physician/patient relationship, and more

<http://www.quality-patient-experience.com/index.html>

#### **HeartBeat**

Sign up for a free e-newsletter on the Quality Patient Experience providing advice with practical applications, simple tools, pointers from patients, and more

<http://www.quality-patient-experience.com/wendy-leebov-e-zine.html>

#### **Journal of Health Care for the Poor and Underserved**

##### ***A Customer Service Approach to Implementing a Best Practice at Community Health Centers***

2006 study focused on a customer service approach to implementing best practices in CHCs, designed to be responsive to the tremendous demands on and limited resources of CHC staff. A tobacco system was the focus of this project; however, it is applicable to implementing in clinical settings generally, regardless of the particular health topic.

<http://www.ncfh.org/pdfs/6213.pdf>

### **Suggested Books**

- Customer Service in Health Care: A Grassroots Approach to Creating a Culture of Service Excellence, by Kristin Baird
- Customer Service for Professionals in Health Care, by Wendy Leebov
- Service Excellence, The Customer Relations Strategy for Health Care, by Wendy Leebov
- Leadership for Great Customer Service: Satisfied Patients, Satisfied Customers, by Robert J. Cates and Thom A. Mayer

### **Related CHAMPS Archived Webcasts on CD-ROM**

- **Customers Only Want Two Things**, CHAMPS Archived Webcasts Volume 2, February 2005, Presented by Kevin R. Miller
- **Dealing with the Cranky, Crusty, and Crabby: Serving the Difficult Customer**, CHAMPS Archived Webcasts Volume 7, June 2006, Presented by Kevin R. Miller

**Purchase** Archived Webcasts on CD-ROM

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[www.champsonline.org/Events/Distance\\_Library.asp](http://www.champsonline.org/Events/Distance_Library.asp)

### **ADDITIONAL RESOURCES: BEHAVIORAL INTERVIEWING**

Hiring the right candidate, the first time out, is key to low turnover, high productivity and employee satisfaction. Traditional interviews, even traditional Behavioral Interviews, often give you information regarding what the candidate believes they would do in specific situations, not necessarily what they actually would do. Traditional interviews may give you a good picture of the person's interviewing skills, but not their actual skills, abilities and organizational "fit". Integrated Work Strategies offers a three hour course on Behavioral Interviewing, in which participants learn to perform interviews that help ensure that they have a true, honest, and complete picture of the candidates they've met, helping them to make the best hire possible, legally and efficiently. To learn more, contact Lisa Mouscher at Integrated Work Strategies: [lisa@integratedwork.com](mailto:lisa@integratedwork.com) or 303-516-9001.