



**STRATEGICS**  
International Inc.

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# **CUSTOMER SERVICE ANNUAL PLANNING**

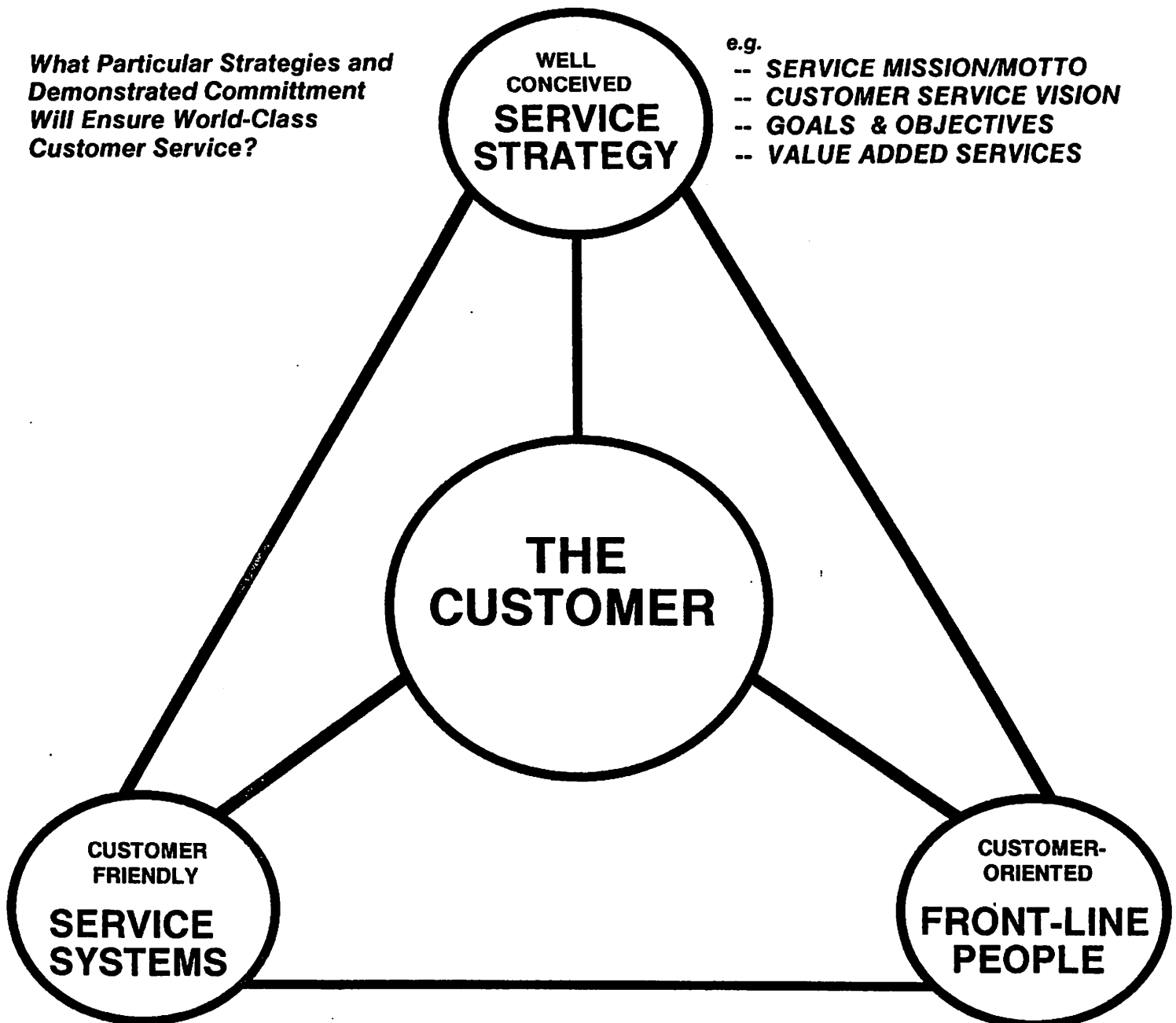
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## **FACILITATORS MANUAL**

**Procedures, Overheads & Hand-Outs  
For 10 Workshop Sessions**

*The Triangle of Service Model \*\**  
*Organization Assessment*  
*The Customer's Report Card*  
*Service Cycle Diagramming / Failpoint Analysis*  
*"If Looks Could Kill Video" Discussion*  
*The Customers' Bill of Rights*  
*Service Delivery Goals & Objectives*  
*Employee 10 Commandments*  
*Moments of Truth -- Service Enhancers*  
*Mission Statement/Evaluation*

## THE TRIANGLE OF SERVICE \*\*



*What Particular Strategies and Demonstrated Commitment Will Ensure World-Class Customer Service?*

e.g.

- SERVICE MISSION/MOTTO
- CUSTOMER SERVICE VISION
- GOALS & OBJECTIVES
- VALUE ADDED SERVICES

*How Can We Make Our Systems More Efficient and Customer Responsive?*

e.g.

- SERVICE CYCLES STREAMLINING
- QUALITY STANDARDS
- CUSTOMER FEEDBACK
- ONGOING PROBLEM SOLVING

*How Can We Insure Positive Customer Service Attitudes and Behaviors from Everyone?*

e.g.

- CUSTOMER BILL OF RIGHTS
- EMPLOYEE 10 COMMANDMENTS
- EMPLOYEE TRAINING PROGRAM
- EMPLOYEE RECOGNITION

\*\* Adapted from Service America, Karl Albrecht & Associates

## CUSTOMER DRIVEN ORGANISATION

	DESCRIPTION OF END PRODUCT	CUSTOMER NEEDS ASSESSMENT PROCESS	QUALITY ASSURANCE MECHANISMS	CUSTOMER ASSESSED QUALITY PARAMETERS
PHASE I	MASS MANUFACTURED PRODUCT	MARKET RESEARCH ON CUSTOMER NEEDS	SQC, QCs, SUGGESTION SCHEMES	TANGIBLES AND PRODUCT RELIABILITY
PHASE II	DITTO, BUT ADAPTED TO INDIVIDUAL NEEDS AND OPTIONS	INPUT FROM INDIVIDUAL CUSTOMERS	COMPUTERISED PRODUCTION PLANNING & CONTROL AND FLEXIBLE MANUFACTURING SYSTEMS	RESPONSIVENESS TO CUSTOMER NEEDS
PHASE III	CUSTOMER SENSITIVE SERVICE BUNDLED WITH PRODUCT	CUSTOMER DIALOGUE	EMPOWERED FRONT-LINE STAFF	EMPATHY OF FRONT-LINE STAFF
PHASE IV	CUSTOMER EMPOWERMENT	CUSTOMER ENGAGEMENT	BOUNDRYLESS, PROCESS-ORIENTED, SPEEDY ORGANISM	ASSURANCE (FAIRNESS, TRUST AND LONG TERM RELATIONSHIP)

# ANNUAL PLANNING RETREAT

## CUSTOMER SERVICE

2-Day Format

<p><u>Overview:</u> <i>Agenda</i></p> <p><u>Discussion:</u> <i>Accomplishments, Learnings, Strengths Challenges/Customer's Report Card</i></p> <p><u>Presentation:</u> <i>The Triangle of Service</i></p> <p><u>Workshop:</u> <i>Service Cycle Analysis &amp; Diagramming</i></p>	<p><u>Workshop:</u> <i>Customers' Bill of Rights</i></p> <p><u>Film &amp; Discussion:</u> <i>"If Looks Could Kill"</i></p> <p><u>Workshop:</u> <i>Moments of Truth - Service Enhancers</i></p>
<p><u>Workshop:</u> <i>Individual Depts. Goals &amp; Objectives</i></p> <p><u>Reports:</u> <i>Departments' Goals &amp; Objectives</i></p> <p><i>and</i></p> <p><i>Service Mottos</i></p>	<p><u>Workshop:</u> <i>Employee 10 Commandments</i></p> <p><u>Refinement:</u> <i>Mission Statement</i></p> <p><u>Discussion:</u> <i>Next Steps</i></p> <p><u>Evaluation</u></p>

# ANNUAL PLANNING RETREAT

## CUSTOMER SERVICE

### FIRST DAY

- 8:00 Introduction: CEO  
8:15 Overview and Agenda  
8:30 Discussion: *Division Accomplishments & Challenges*  
9:30 Break  
9:45 Presentation: *"The Triangle of Service"*  
10:15 Workshop: *Service Cycle Analysis/Diagramming*  
11:15 Depts' Reports: *Service Mottos & " "*  
12:15 Lunch  
1:15 Workshop Reports (cont'd)  
2:00 Break  
2:15 Workshop: *Departments' Annual Goals & Objectives*  
3:30 Depts' Reports:  
5:00 Close

### SECOND DAY

- 9:00 Workshop: *"The Customer's Bill of Rights"*  
10:00 Break  
10:15 Reports (cont'd) *Depts: Goals and Objectives*  
11:00 Film: *"If Looks Could Kill"*  
11:30 Discussion: *Behaviours that Enhance or Murder*  
11:45 Workshop: *"Moments of Truth - Service Enhancers"*  
12:15 Lunch  
1:15 Team Reports:  
2:15 Report: *"The Customer's Bill of Rights*  
2:30 Workshop: *"Employee 10 Commandments"*  
3:45 Break  
4:00 Review/Refine: *Mission Statement*  
4:30 Discussion: *Next Steps*  
4:45 Evaluation of Retreat (verbal and written)  
5:00 Close

# OPENING DISCUSSION

## ORGANIZATION ASSESSMENT

**Intended Results:** This is a good way to allow individuals to brag about the year, express their concerns early (challenges) and receive a 'global' picture of the whole organization. The co-facilitator scribes up front everything that is said, using a colored marker for the question, and darker markers for answers. Sometimes mind-mapping the challenges section can be also helpful.

**Rational Obj:** To understand what has been going on in the Division and its separate departments.

**Experiential Obj:** To become excited about what has been accomplished and the potential of the group to deal with the future.

**Introduction:** We're pleased to be here today to work with you again. Not every organization has a manager or Vice President that allows whole Division to take 2 or 3 days off-site share concerns, and plan the year. Now let's see who is here today.

1. Where is each department. How many people are here today?
2. Who has worked here the longest, the shortest?

**Discussion:** We want to have you assess your work for the year and start with your major accomplishments.

1. What have been some **accomplishments** of your Division, or departments, both big and small? (*Scribe them on a 8 flip chart sheets on front wall. (about 30-50 )*)
2. You've done so much -- what have been the **learnings** this year? (*Scribe 10-12*)
3. What would you say are the **strengths** of this team. (*Scribe 10-12*)
4. Instead of problems, or concerns, I like to use the word challenges. What are some of the **challenges** you face as a Division, or as separate departments in the next 12 months? (*Scribe 10-30; if you mind map these -- use a different color for different areas or branches of the same challenge -- as the group talks.*)

If they have reports from their survey, 'The Customer's Report Card -- "Your Opinion Counts"' have each Department report on the 3-5 major challenges raised by this customer feed-back. (*For a 3 day consult extend the Customer's Report Card feedback presentation from each department to the whole group.*)

**Close:** During the next few days we will work with you on these challenges and assist you in building action plans to implement change.

# THE TRIANGLE OF SERVICE MODEL

## OVERVIEW AND PRESENTATION (cont'd)

6. **Front-Line People.** The customer pays your check. He or she deserves your respect, your politeness and your going the extra mile for him. Many firms have had employees create the Custom Bill of Rights and Employee 10 Commandments to outline the particular behaviors that are expected. Of course, ongoing training and employee recognition reinforces such activities.
7. In last years planning we developed a 3-year vision. In this **Annual Planning Retreat** we will focus all our discussions and activities on improving customer service.

In terms of Service Strategy, we will work on each department's **Service Motto and Goals and Objectives**

In terms of Service Systems, we will **Analyze Each Department's Service Cycles**, and look at ways to make them more efficient re: saving time and enhancing quality.

In terms of Front-Line People we will develop the **Customer Bill of Rights** and (when the secretaries and receptionists arrive) develop the **Employee 10 Commandments** to each department. We will do this after we see a **British Murder Mystery** which will stir your thinking.

8. We can only do start this process with you. You need to carry it on. You will need to find ways to continue the customer feed back, to analyze all your service cycles, not just the ones that we will scrutinize today, and find many new ways to serve your customers.
9. Before we work on strategy let's look at "How Service is Different than Product" (see overhead)

Go around the room and read each one.  
Get examples  
Add some new ideas.

# THE TRIANGLE OF SERVICE MODEL

## OVERVIEW AND PRESENTATION

### Presentation Points:

1. In the last ten years the key message that most organizations are facing is the concept that *customer service is the key to the success of your organization.*
2. Many books and articles have been published on this topic however the book that launched this revolution was, Service America, by Albrecht and Zemke.
3. Service America is unique because the authors presented a model that put the customer at the center of service and said that every organization must have its strategy, systems and behaviors of the front line people focused on the customer.
4. Let's look at **Strategy**. The key Q is what approaches will put the customer first. Many organization are developing a service mission, or motto to remind themselves of their focus. Others are creating a vision with added values to service.
  - Now look at Dominos. What's there motto? If that's their strategy what are some systems they have to have in place? (*Elicit ideas like, cars working, maps and routes in back room, leather cover to keep pizza hot etc.*)
  - Let's look at Holiday Inn. If convenience is their motto, what does this mean in terms of location? What other systems do they need to have to make reserving rooms convenient for you? (*Elicit things like computer system, easy key return etc.*)
  - What about Hyatt Hotels. If luxury is their motto, then what systems do they need to have in place to make you feel like a king or queen (*elicit things like elegant decor, bathrobe in room, 2 TVs per room, 1 in bathroom, covers turned down, chocolate mint on pillow, valet service etc.*)
  - Look at the Strategies from American Bankers. Read it aloud. What is emphasized there?
5. **Service Systems**. No point in having a strategy unless all the systems that serve the customer a friendly. there's nothing worse than having a service rep say, "I'm sorry the computer can't do that. Or my boss needs to sign off on this and he isn't here. Every organization must reassess its systems -- and make sure they are streamlined, timely, and do not give obstacles to the front line people in serving the customer. Every organization must have regular customer focus groups or surveys to search out new improvement opportunities. On going problem-solving by the employes themselves, who face system problems daily are mandatory.



## HOW SERVICE IS DIFFERENT THAN PRODUCT \*\*

1. The service cannot be demonstrated. A sample cannot be sent to the customer in advance of actual practice.
2. The sale, production and delivery of a service takes place almost simultaneously.
3. A service takes up no shelf space and cannot be stockpiled.
4. The individual who receives the service participates in the production of the service.
5. The person who receives the service owns nothing tangible.
6. The more people that are involved with the delivery of the service, the less likely it is that the receiver will be satisfied.
7. Exerting quality control over a service requires monitoring of morale and attitudes.
8. The receiver's expectations of the service are integral to his or her judgment about the quality of the service.

\*\* With permission, Service America, Albrecht and Zemke

## CUSTOMER SERVICE STRATEGIES

*At American Bankers, Service Is The Difference!*

*We Care About Our Customers And Commit Ourselves To Quality Customer Service By:*

Providing innovative and competitive products designed to meet the needs and expectations of our customers.

Delivering quick response by knowledgeable and highly motivated employees who believe the customer is Boss.

Striving for reliable and consistent support delivered by accounting, claims and processing area

*We Insure This Commitment By:*

Actively soliciting the needs and opinions of our customers.

Continuously reviewing our company policies and procedures for customer ease of access.

Providing training, award opportunities and measurable service standards for each of our employees.

### COMPARISONS

**Dominos Pizza:**            *"Hot pizza in delivered in 30 minutes!"*

**McDonalds:**                *"Speed, efficiency, low price, and convenience."*

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**Holiday Inn:**                *"Convenience at a moderate price."*

**Hyatt Hotels:**                *"Luxury environment for the business traveler."*

# YOUR OPINION COUNTS.

We want to serve you better. The \_\_\_\_\_ Department would like your **honest opinions** on how we're doing! Please take 10 minutes and complete this survey and mail it to \_\_\_\_\_ by November 15. We will discuss your ideas at our Annual Planning Retreat in December.

*What do we do well?*

*Some examples are:*

*What do we need to improve?*

*Suggestions:*

Please circle the number which best describes your level of satisfaction, and rating of our services and support to your department. The rating scale is from 1 - 4, whereby 1 represents *not at all satisfied*, and 4 represents *fully satisfied*.

	<b>IMPORTANCE</b>				<b>PERFORMANCE</b>			
	Not Important			Very Important	Poor			Excellent
<b>Service Line</b> Your existing services meet my needs.	1	2	3	4	1	2	3	4
<b>Special Services</b> Staff tailor services for me when standard approaches won't work.	1	2	3	4	1	2	3	4
<b>Service Knowledge</b> They know the job and how to get things done.	1	2	3	4	1	2	3	4
<b>Responsible</b> They do not make excuses for delays or passes the buck.	1	2	3	4	1	2	3	4
<b>Follow-Up</b> Provides prompt & thorough response to complaints, questions etc.	1	2	3	4	1	2	3	4

**IMPORTANCE**  
Not Important                  Very Important

**PERFORMANCE**  
Poor                                  Excellent

**Fairness**  
They treat me and my staff fairly.

1    2    3    4

1    2    3    4

**Respect**  
Staff treat me & my employees  
politely and with respect.

1    2    3    4

1    2    3    4

**Attitude**  
The group has a *hands-on*, problem-  
solving attitude.

1    2    3    4

1    2    3    4

**Accessibility**  
They are easy to contact when I  
need information or assistance.

1    2    3    4

1    2    3    4

**Communications**  
They tell me if there is a problem  
& how it will be solved.

1    2    3    4

1    2    3    4

**Commitment to Success**  
Staff are committed to get it done in  
difficult situations/emergencies.

1    2    3    4

1    2    3    4

**Flexibility**  
Dept. is willing to bend policies  
and procedures to meet my needs.

1    2    3    4

1    2    3    4

**Responsiveness**  
Employees return my calls or  
messages promptly.

1    2    3    4

1    2    3    4

**Efficiency**  
They process things quickly and do  
it right the first time.

1    2    3    4

1    2    3    4

**Organizational Savvy**  
They can are are willing to manage  
the bureaucracy to get things done.

1    2    3    4

1    2    3    4

**Decision-Making**  
They are decisive in ambiguous  
situations to meet my needs.

1    2    3    4

1    2    3    4

*Additional Comments:*

# WORKSHOP PROCEDURES

## SERVICE CYCLE DIAGRAMMING (ANALYSIS)

**Rat. Obj:** *To understand the steps in the service cycle process; discover failpoints and opportunities for improvement; to suggest changes.*

**Exist. Aim:** *To become fascinated with the possibilities for inquiry and consensus.*

**Results:** *This workshop assists different departments (service teams) to understand what the others are doing all day. It reveals the actual process or procedures that other teams had to go through to service a customer (internal or external.) Fascination, empathy and understanding ensue.*

**Context:** (20 minutes)

- A. **Mini-Discussion:** Draw a circle on flip chart. Ask, Who are your customers (distinct groups/market segments. (Place each within the pie, dividing up the pie. What are each's special needs? List out. Reflect.
- B. **Short-Course:** Look at the Triangle of Service, the service systems corner and inform them that
1. In manufacturing, a Production Line is a series of technical operations.
  2. In service industries, or dept's, the Service Line = a series of customer experiences.
  3. A methodology to improving service requires one to
    - a. Analyze the service cycles by dividing each service cycles into its separate steps, operations, or 'customer experiences'.
    - b. Look for failpoints, or opportunities for improvement, e.g., (*time delays, repeated work, etc.*)
    - c. Implement changes to meet customers needs.
  4. Example:(overhead What are the Cycles of Service?) A cycle of service:
    - a. Begins at the very first point of contact between the customer and org.
    - b. Ends only temporarily when the customer considers the service complete and it begins anew when she decides to come back for more.
    - c. Often separate cycles of service within an org. are managed by an independent set of employees, often unconnected to each other.
  5. Illustration: (use overhead again)  
Walk through tele. service and airline service.  
Have group give examples of some steps in each part of the process.

**C. Assignment:** Each department, or service team (see overhead) *(45 min - 1 hour)*

1. Discuss your main customer groups you serve and their special needs/wants.
2. Invent a motto for your department (or service team) which embodies your service strategy.
3. Diagram a typical 'good service cycle' in your department (*from the "request for service' -- to product delivery"*)
4. Diagram a typical "burdensome service cycle" in your department (*from the "request for service' -- to product delivery"*)
5. List our 3-5 actions your department(or service team) could do to improve this service (*save time, increase quality, etc.*)
6. What are some actions the Division (or department) could do to support you in these efforts?

**D. Reports/Feedback** *(5-15 minutes each)*

1. Have each group give report.
2. Ask for additional questions of clarity.
3. Ask for suggestions from total group to improve action plan.
4. Consider other ways the Division can support the department (or team)

**E. Workshop Reflection:** *(3-5 min)*

1. What did you discover during this exercise/
2. What are implications for the future?

(Note: that every department or service team) needs to do this exercise for every cycle of service it manages.)

**A Production Line is a series of technical operations**

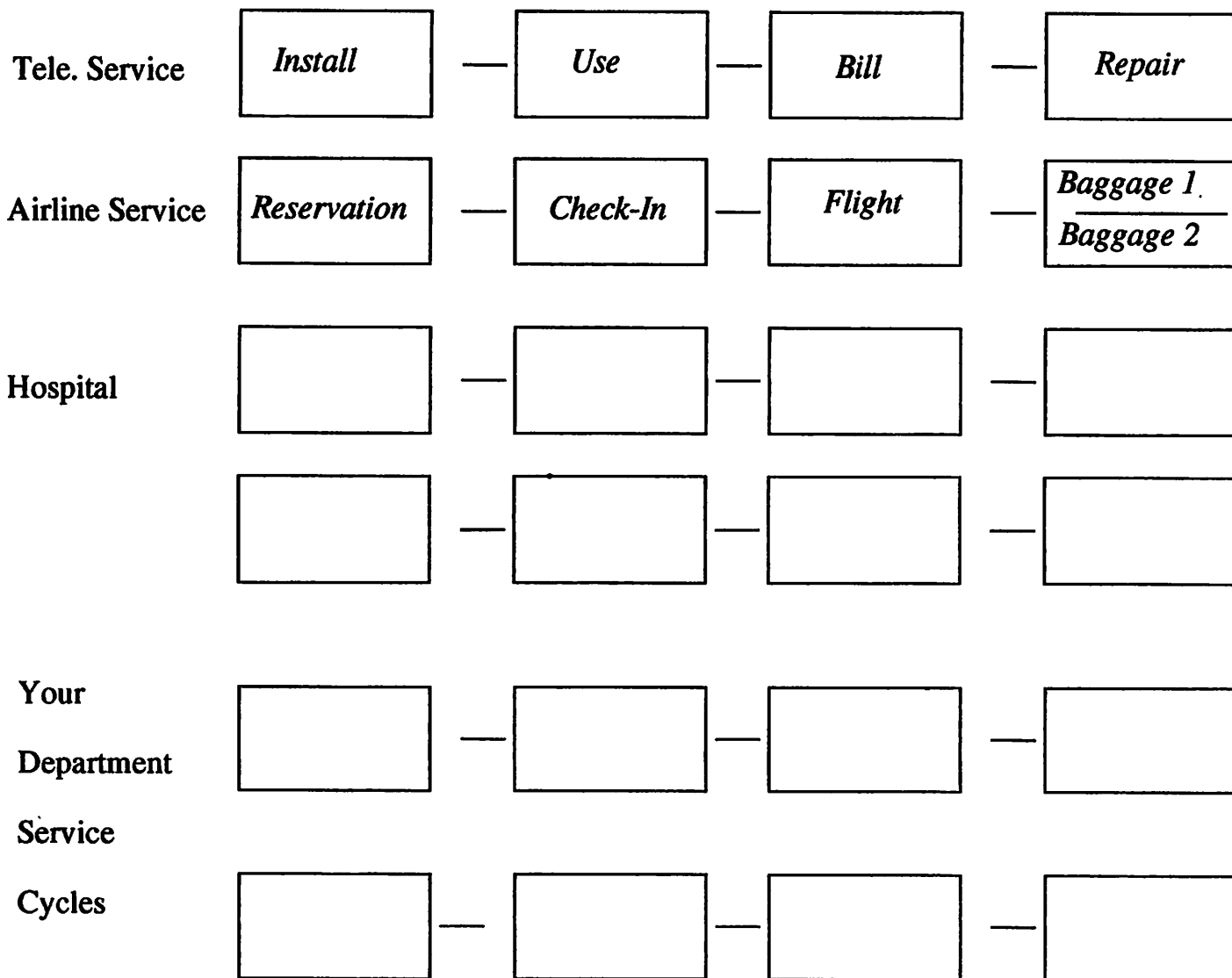
**The Service Line = a series of customer experiences**

**Improving service requires:**

- 1. Analyze the service cycles. . .**
- 2. By dividing each service cycles into its separate steps, operations, or 'customer experiences'.**
- 3. Look for failpoints, or opportunities for improvement, e.g., (*time delays, repeated work, etc.*)**
- 4. Implement changes to meet customers needs.**

# What are the Cycles of Service?

**Examples:** All organizations have many different cycles of service.



## Cycle of Service

It begins at the very first point of contact between the customer and your organization.

It ends only temporarily, when the customer considers the service complete, and it begins anew when he or she decides to come back for more.

Often separate cycles of service within an organization are managed by a an independent set of employees, often unconnected to each other.



# SERVICE DIAGRAMMING

Discuss your main customer groups you serve and their special needs and wants.

1. Invent a motto for your department which embodies your service strategy.
2. Diagram a typical “good service cycle” in your dep’t.: *(from the ‘request for service’ - to ‘product delivery’)*
3. Diagram a typical “burdensome service cycle” in your dep’t.: *(from the ‘request for service’ - to ‘product delivery’)*
4. List out 3-5 actions your Department could do to improve this service. *(save time, increase quality, etc.)*
5. What are some actions the Division could do to support you in these efforts?

## SERVICE MOTTOS

### Jackson Memorial Hospital HR Division

#### TRAINING AND DEVELOPMENT DEPARTMENT

*“Dedicated to your professional growth.”*

#### PERSONNEL RECORDS DEPARTMENT

*“To provide courteous, prompt, quality service to all hospital employees seeking our assistance.”*

#### ADMINISTRATION/OFFICE AUTOMATON

*“Provide the customer with a better product than the one they asked.”*

#### LABOR RELATIONS

*“To provide factual information and interpretation to all inquires within agreed upon time limits.”*

#### EMPLOYMENT OFFICE

*“We hire the right person for the right job as quickly as possible for the long-term.”*

EMPLOYEE ASSISTANCE PROGRAM *“Courage, Choice, Change.”*

#### COMPENSATION & BENEFITS

*“Guaranteed commitment to provide competitive salary and benefits programs.”*

#### AFFIRMATIVE ACTION OFFICE

*“Expect confidential, thorough and prompt service from us.”*

# WORKSHOP PROCEDURES

## 'STAND UP MEETINGS' FOR DEP'T. CUSTOMER SERVICE GOALS & OBJECTIVES

(when you are dealing with more than 1 department within a division  
at the same time in an annual retreat format)

**Intended Results:** *This workshop is helpful if you are working with 30 - 100 people in a division (with only 1 or 2 facilitators) in which the manager expects (among other things) the presentation of the goals and objectives of each department. Image: each department team is standing up in front of a flip chart around the edge of the room.*

**Rational Obj.** *To understand the specific goals and objectives of my own department and the other departments within the division.*

**Experiential Obj:** *To become empowered and excited by the participative methods utilized in developing the year's plan as a whole department*

**Context:** (3 min.)

We've discussed the need for a service strategy, customer friendly service systems and customer oriented service people for each department. We've done some work analyzing opportunities for improvement in each area for each department, now's the time to put a plan into action.

**Individual Brainstorm:** (10 min.) (Use overhead: questions italicized below)

**Well-Conceived Service Strategy:**

*What projects or activities can your department do this year to meet the hospital's (customers') needs?*

**Customer-Friendly Service Systems:**

*What policies, procedures, methods, space arrangement, equipment should be instituted to better meet your customer's needs?*

**Customer-Oriented Front Line People:**

*What incentives, training, or recognition activities will insure professional customer-sensitive behavior?*

**Prioritizing/Teamwork** (45-60 min.) Use instructions on overhead (see italics below)

2. *Start 5 best ideas.*
3. *Print up on Post-its.*

(Give them time to do this then read next 3 steps and do demonstration)

(Give them time to do this then read next 3 steps and do demonstration)

4. *Place on flip-chart*
5. *Group similar ones and discuss.*

Demonstration by facilitator (*make it snappy and fun!*)

1. Have 10 post-its written up with these words: *apple, mango, pineapple, giraffe, llama, macintosh, monkey, computer, IBM, Compac*
  2. Place them scattered on a flip-chart.
  3. Ask them to help you group similar ones: into (probably) categories of animals, computers, fruit (macintosh could go several places!)
  4. Name each category with them; write on flip chart.
  5. Tell them for each idea cluster a goal should be decided and then put on time line.
6. *Decide year's goal for each 'idea cluster'; place on time-line.*
  7. *Add other post-its showing projected quarterly accomplishments.*

### **Reports Preparation** (10 min.)

Have each group bring the flip chart sized time-line to the front of the room for the report (or even better -- have them re-write in on an overhead in which they will need to convert a horizontal timeline to a vertical one. (Benefits: rewriting it will improve it again).

6. *Decide year's goals for each idea cluster; place on time--line.*
7. *Add other post-its showing projected quarterly accomplishments*

### **Reports/Feedback** (10 min. per report)

Instructions to total group: Listen to each report, ask yourself, is this report clear to me? Is it realistic. Does it stretch this department. Are the assignments to individuals or to teams for implementation decided. Is the time-line appropriate. How can my department and/or the division assist this department in meeting their goals

1. Have each group give report.
2. Ask for questions of clarity.
3. Ask for other feedback: suggestions for improvements or implementation.
4. Ask for other ways the Division could support this department.

### **Workshop Reflection** (5 min.)

1. What did you discover during this exercise?
2. What else needs to be done?

## DEPARTMENT PLANNING

### *1. Individual Brain-storming:*

#### Well-Conceived Service Strategy:

What projects or *activities* can your department do this year to meet the hospital's (*customers'*) needs?

#### Customer-Friendly Service Systems

What *policies, procedures, methods, space arrangement, equipment* should be instituted to better meet your customer's needs?

#### Customer-Oriented Front Line People:

What *incentives, training, or recognition activities* will insure professional customer-sensitive behavior?

DEPARTMENT PLANNING *(cont'd.)*

2. *Star 5 best ideas.*
3. *Print up on cards.*
4. *Place on flip-chart.*
5. *Group similar ones and discuss.*
6. *Decide year's goal for each 'idea cluster'; place on time-line.*
7. *Add other post-its showing projected quarterly accomplishments.*

# GOALS AND OBJECTIVES

PROJECT:

GOAL:

*Jan-Mar.*

*Apr-Jun.*

*Jul.-Sep.*

*Oct.-Dec.*

O  
B  
J  
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C  
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V  
E  
S

PROJECT

GOAL:

*Jan-Mar.*

*Apr-Jun.*

*Jul.-Sep.*

*Oct.-Dec.*

O  
B  
J  
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E  
S

**1-YEAR GOALS & OBJECTIVES ACTION PLAN***Projected Goal:**Due Date:**Objectives**Who**Date*

1.

2.

3.

4.

---

*Projected Goal :**Due Date:**Objectives**Who**Date*

1.

2.

3.

4.



# WORKSHOP PROCEDURES

## CUSTOMERS BILL OF RIGHTS

**Intended Results:** This workshop creates the practical poetry of establishing high standards of service. Using stand-up meetings, group reflection, and a pull-together by the consultant, it creates a deep sense of awe among participants and a deep desire to move to a higher plane of service.

**Rational Obj.:** To understand the specific practical needs of their customers and to create a roster of customer expectations to guide employee actions.

**Experiential Aim:** To become excited by the consensus developed which standardizes employee behavior in the every day.

**Context:** (3 min) Let's look at the triangle of service model again. As front-line people we are either serving our external customers, or our internal customers who serve our customers. To do this Zemke (Service America) says that we must "*get into the frame of mind of the customer*", and to literally "*walk in his or her shoes*".

For instance, when I telephone a client and the secretary says, "Please hold," I become annoyed if I have to wait more than 15 seconds, and I really get mad if I have to listen to company advertising with background music. I start to become angry and think, "this company doesn't care about me".

Another example: Once I was working in a department store and I had a problem with the amount on my pay check. When I called the compensation and benefits office, the clerk was curt to me. After that I didn't feel very cheerful in selling clothes and was angry at all my external customers that morning.

In fact the statistics say that if you fail in serving the customer, that person will tell 7-10 people. That's a lot of business to lose. Or if it is an internal customer, that person will be angry at at least 7-10 more people and the morale and service of your department will decline.

### **Presentation/Discussion.** (15 min.)

1. Let's look at our customers (*facilitator draws a circle on the flip chart.*) Ask the, "Who are your customers? What are your customer segments? (*write the name of each in a pie piece*). Reflect: What are the uniqueness of some of these groups?"
2. Now let's look at an example of a Customer's Bill of Rights from another organization (American Bankers, or Jackson Memorial Hospital)
2. Facilitator reads 2 at a time and then asks questions like, What did you like there? What problem did this organization have that they wrote this particular bill of rights? (Repeat process till the end.)

**Individual Brainstorm:** (7 min) To “get into the frame of mind of the customer”, a to literally “walk in his or her shoes”. I want you to jot down answers to some questions I have. This is not a test; no one will see your confidential thoughts” (post questions on flip-chart or overhead Cover up ques.2 and 3 as you have them start dealing with question 1)

1. What is the biggest complaint about your department? (give them time to write down their answer before you reveal and ask the next question)
2. What is a typical mistake or oversight you often see your co-workers do?
3. What is the worst mistake or omission you made in dealing with a customer?

**Individual Prioritizing:**(2 min.) Now, look over your work -- these are the sins of your department! Now we are going to take some of these sins and turn them in bill of rights.

1. Take 2 of them and write up 2 bill of rights on your sheet of paper.

**Teamwork** (15 -25 min)

1. Now let's count off by 5's so that we have 8 teams in the room.
2. Each team will go to its assigned space.where there is a flip-chart sheet of paper with your number around the edge of the room.
3. When you get to that space, discuss each of your bill of rights.
4. Print up 4 of your best ones, by combining what you have each written.
5. Now this is very important: begin each sentence with “*The customer expects*”, or “*the customer deserves*”, or “*the customer needs*” etc.
6. When you finish your work bring your paper up front and stick on the front wall.

**Reports & Reflection:**( 25 min.) During this time the facilitator listens the group response to different phrases and words. Don't make any firm decisions in front of the group now.

1. Let's read the first two reports. Facilitator reads them aloud.
2. What words do you like in this report; what adjectives are compelling? (facilitator underlines these words or phrases with a red magic marker)
3. Which ones did the group say “ah” to? (Put a red asterisk next to this one)
4. Which is really on target? (Move on to the next 2 reports and repeat the same process.)

**Close:** Tell the group that during the next workshop (conducted by co-facilitator) you will pull-together their Bill of Rights on the computer and print it out for them.

**Consensus:** Facilitator types up group's work. To do this, start from the beginning & type i starred ones, also incorporating other underlined phrases. Shoot for 10.

**Report Back to Group:**( 10 min.)

1. Run copy through hotel xerox on overhead. Present it back to the group, after next workshop. Uncover it slowly as you read slowly 1 -10. Let there be awe in the room.
2. At the end ask them, “How to you feel about your bill of rights? What could you do with this? Where you might post it? (encourage framing it) (don't push for changes now) Okay let's keep this for a while and go to lunch.

## **OUR CUSTOMERS' BILL OF RIGHTS**

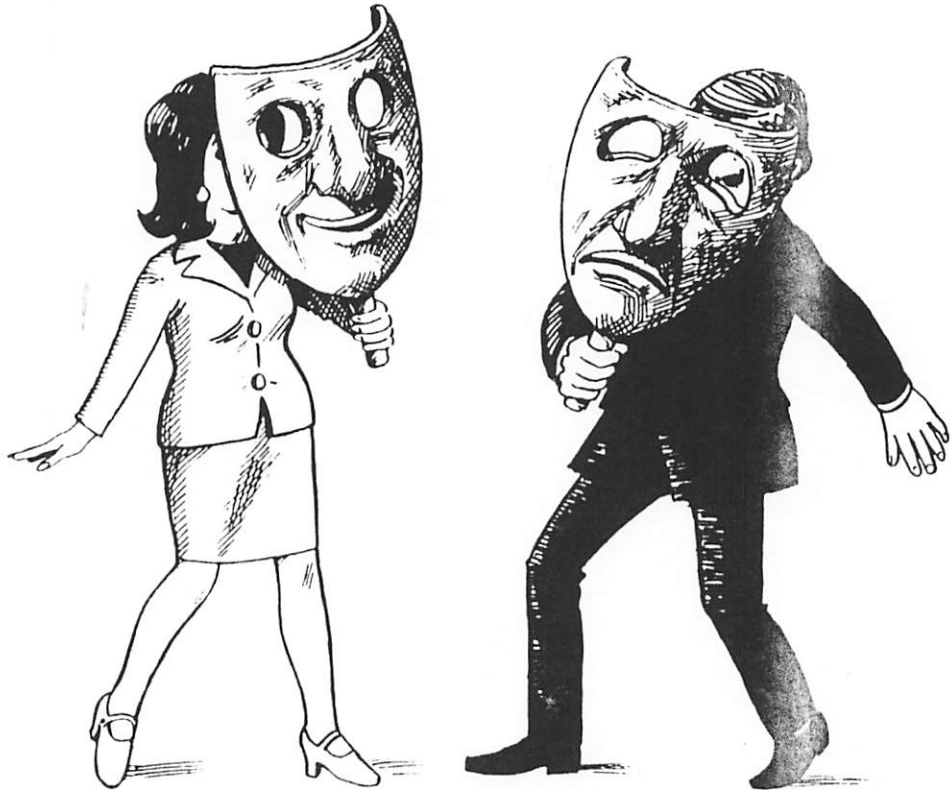
### **American Bankers Insurance Company**

**Who is the most important person to you? The Boss! At our company the Boss is our our accounts and customers. Without them your livelihood and our Company would cease to exist. The Boss's rights must be protected. These are the guidelines:**

- 1. Our Customers deserve to have their expectations met as well as their needs.**
- 2. Our Customers should feel that solving their problems is YOUR FIRST PRIORITY!**
- 3. Our Customers are worthy of motivated, professional and enthusiastic employees.**
- 4. Our Customers expect that our procedures to ensure their calls and correspondence go to the right place... the first time.**
- 5. Our Customers want us to communicate with them in non-technical manner avoiding difficult insurance terms and concepts.**
- 6. Our Customers expect us to answer their telephone calls within three rings.**
- 7. Our Customers require us to return their calls within 24 hours.**
- 8. Our Customers need us to respond to their letters within 5 days.**
- 9. Our Customers expect timely and fair payment of their claims.**
- 10. Our Customer's are our life-long friends. Remember "the most important person in the company is the one who makes the sale." And in every communication, you continue to make the sale!**

# IF LOOKS COULD KILL

THE POWER OF BEHAVIOUR



**Discussion Leader's Guide**  
**By Peter Honey**



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# STRATEGICS

International Inc.

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Dear Colleagues,

I am pleased to send you the Customer Service Facilitation Manual plus a mini-sample document to give you a feel of the final product.

Even though many of these workshops have been done by Strategics over the years we feel that the 2-day format that we completed recently was a winner. If we had to do it again we would prefer 3 days.

This format was designed for Jackson Memorial Hospital (similar to Cook County Hospital) Division of Human Resources. It has 9 departments within the division which in many ways have little relation to each other. A year ago we did a traditional strategic planning consult. This year the Vice President requested a 2-day Annual Planning Session with a focus on Customer Service. He also wanted his 'traditional' goals and objectives' session for each department. He also wanted every staff member of each department (sans receptionist and secretaries) to be present totalling 38 people -- and then he wanted all the secretaries and receptionists to come to the last session (!) adding another 28 people. Hence the flow of the present format, dealing with the "Front-Line People" corner of the "Triangle of Service" at the end.

If we were to do this workshop again, I would probably do the "Goals and Objectives" workshop last (having had them keep a journal of all their great ideas throughout) and then incorporating them into this last workshop.

P.S. the video/film is great - a British Murder Mystery. You can rent it easily. Also Elsa Battica has one in her YWCA library -- and might loan it to you. (Retail, its \$800. so guard it well!)

Also if we had had more time we would have done the Moments of Truth as a longer workshop (and incorporated their terrific ideas in the document). Unfortunately due to time, we handled it as a mini-workshop/conversation reflection. It worked well, but the depths could be plumbed more.

I hope you enjoy using some of these modules. Do read Service America by Albrecht and Zemke. It will inspire you to market and facilitate well. Their new book, Service Within, dealing more with internal organizations servicing their employees is also very good.

Obviously any and all of these workshops will complement your varied strategic/annual planning formats. They have been used in both public and private sectors. Do well! If you have any questions, call me, day or night.

Take care



# DISCUSSION PROCEDURES

200 W/L

## Film: "If Looks Could Kill, The Power of Behaviour"

**Intended Results:** This is a delightful British murder mystery that dramatizes that customer service can be the greatest performance of your life and a role that you decide play. Though basic in content it can be used for receptionist/secretary types or even managers to stress the point. It is also a fantastic set up to the Moments of Truth Workshop, though the workshop can be done without it.

**Rational Obj.** To understand how behaviour can motivate or kill people.

**Experiential Obj.** To enjoy the amusing film scenes and to recognize oneself in several instances.

**Context:** (3 minutes) This is the murder mystery that we promised to show you. It demonstrates the power of behaviour and how indeed, your're behavior can kill a person. But before we see the film I'd like you to answer this questionnaire to see where you stand on some behavioral issues..

**Questionnaire:** (10 - 20 min.) See hand out.

**Reflection (Optional):** (10 min.) Mini-teams (3-4 people) discuss their answers.

**Film:** *If Looks Could Kill* Video Arts, Dumbarton House,  
68 Oxford Street, London, W1N 9LA  
Tele: 071-637-7288

**Rent or Purchase from:**

Midland Regional Center, First House  
1 Sutton Street, Holloway Head  
Birmingham B1 1PE  
Tele: 021-666-6998

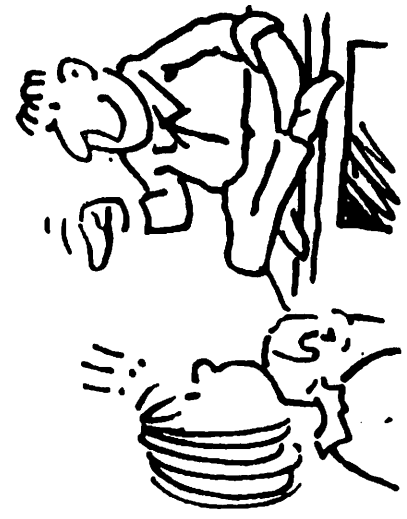
Video Arts Inc.  
8614 Catalpa Ave  
Chicago, IL 60656, U.S.A.  
Tele: 1-800-553-0091

**Art-Form Reflection:**

1. What scenes do you remember? Characters? Things people said?
2. When did you laugh a lot? When was the movie tense?
3. What behaviours almost killed the man? How did he feel?
4. What behaviours almost saved his life? How did he feel?
5. What's the message here -- do you remember some words of wisdom from the film? (*behaviour breeds behaviour, you can choose your behaviour, you can hinder or help a transaction*).

# Behaviour Questionnaire

- 13A  When people behave in ways that disappoint me, I speculate about their underlying motives, attitudes and feelings. **B** When people behave in ways that disappoint me, I try to identify what circumstances brought about their behaviour.
- 14A  So far as other people are concerned, you are your behaviour. **B** People should make allowances for your feelings.
- 15A  Most people are flexible and adjust their style to suit different circumstances. **B** Most people are rigid and stick doggedly to their normal style.
- 16A  I believe that it is best to say what you think even if people might get upset. **B** I believe it is best to keep relationships harmonious and unruffled.
- 17A  Your behaviour style has a major impact on the way other people react. **B** People react in their characteristic ways regardless.
- 18A  It's not what you say but the way that you say it. **B** It's what you say that counts - the way you say it is of less consequence.
- 19A  There is no point in planning because I chop and change my behaviour as the mood takes me. **B** I find that a thought-through plan helps me to be consistent regardless of my mood.
- 20A  Once people are set in their ways they can't change their behaviour. **B** People can increase their repertoire and acquire new ways of behaving if they want to.



- 1A  The way you behave hinders or helps every transaction. **B** The way you behave makes very little difference to a transaction.
- 2A  It is best to stick to your normal way of doing things. **B** It is best to experiment with new or different ways of doing things.
- 3A  People have to accept me as they find me. **B** I adjust my behaviour to suit the person I'm dealing with.
- 4A  You always have a choice when it comes to how to behave. **B** Your behaviour once formed, is fixed. You don't really have any choice.
- 5A  I believe that I need to change my behaviour in order to bring about changes in other people. **B** I believe people behave the way they are, regardless of my behaviour towards them.
- 6A  I believe my head should rule my heart. **B** I believe my heart should rule my head.
- 7A  I believe my feelings and behaviour just happen to me. **B** I believe it is possible to control my feelings and behaviour.
- 8A  In my opinion people's behaviour is largely governed by their personality make-up. **B** In my opinion, people's behaviour is largely governed by what happens to them.
- 9A  It is best to give conscious consideration to behaviour. **B** It is best to concentrate on the subject under discussion and let behaviour flow naturally.
- 10A  I believe my behaviour is a minor factor in determining my effectiveness with people. **B** I believe that my behaviour is a major factor in determining my effectiveness with people.
- 11A  I believe that, on balance, other people cause me problems. **B** I believe that, on balance, cause my own problems.
- 12A  I maintain that people acquire most of their characteristic ways of feeling and behaving. **B** I maintain that people inherit most of their characteristic ways of feeling and behaving.

- 13A  When people behave in ways that disappoint me, I speculate about their underlying motives, attitudes and feelings
- 14A  So far as other people are concerned, you are your behaviour
- 15A  Most people are flexible and adjust their style to suit different circumstances
- 16A  I believe that it is best to say what you think even if people might get upset
- 17A  Your behaviour style has a major impact on the way other people react
- 18A  It's not what you say but the way that you say it
- 19A  There is no point in planning because I chop and change my behaviour as the mood takes me
- 20A  Once people are set in their ways they can't change their behaviour
- B  When people behave in ways that disappoint me, I try to identify what circumstances brought about their behaviour
- B  People should make allowances for your feelings
- B  Most people are rigid and stick doggedly to their normal style
- B  I believe it is best to keep relationships harmonious and unruffled
- B  People react in their characteristic ways regardless
- B  It's what you say that counts - the way you say it is of less consequence
- B  I find that a thought-through plan helps me to be consistent regardless of my mood
- B  People can increase their repertoire and acquire new ways of behaving if they want to



## Score Key

The questionnaire is designed to probe the assumptions you make and the beliefs you hold about behaviour. The film 'If Looks Could Kill: The Power of Behaviour' makes some fundamental points about behaviour and its importance in face-to-face encounters with people. This score key is simply a way of measuring the extent to which you are likely to agree or disagree with the messages of the film. The higher your score the closer the match between your beliefs and those built into the film. The lower your score the more the mismatch between your beliefs and the film's. This score key will not, therefore, be the final arbitrator on who is right or wrong. It is, quite literally, a matter of opinion.

You score 1 point each time you chose a statement that was compatible with the film's messages and no points each time you chose a statement that was incompatible with the film.

Item	Points	Item	Points
1A	1	1B	0
2A	0	2B	1
3A	0	3B	1
4A	1	4B	0
5A	1	5B	0
6A	1	6B	0
7A	0	7B	1
8A	0	8B	1
9A	1	9B	0
10A	0	10B	1
11A	0	11B	1
12A	1	12B	0
13A	0	13B	1
14A	1	14B	0
15A	1	15B	0
16A	0	16B	1
17A	1	17B	0
18A	1	18B	0
19A	0	19B	1
20A	0	20B	1

## Interpretation

A score of 17 or more indicates that the film will confirm and reinforce the views you hold about behaviour. Relax and enjoy it.

A score in the band 13 - 16 indicates that the messages of the film will have some surprises for you.

A score in the band 9 - 12 indicates that you are likely to find some of the messages of the film difficult to come to terms with.

A score of 8 or less indicates that you need to do some hard thinking about the importance of behaviour. The film and accompanying Booklet will make an excellent starting point.



# WORKSHOP PROCEDURES

## MOMENTS OF TRUTH

**Intended Results:** This workshop is both entertaining and productive. It allows the participants to design new and creative ways to ‘knock the socks off’ of their customers.

**Rational Obj.:** To understand the consequences of creating different kinds of moments of truth.

**Experiential Obj.:** To be delighted with creating shining moments of truth within one’s own department.

**Context:** (20 min.)

1. Point to flip-chart and look at Dull Moment and reflect back on movie. When did the customer feel that way? (Repeat, Shining Moment)
2. Review The Triangle of Service. A dull (or shining moment) is due to a failure (or success) of strategy, systems or people. (read from Service America, paragraph “We can learn a great deal. . . -- see next paper)
3. Readings from Service America, by Zemke, Moments of Truth Chapter. Now I’ll read you some examples from his book again, and you decide if the failure or success was due to strategy, systems or people.

**Read:**

1. Dull Moment 2: Bug letter. Which was that strat, syst or people? Why? (syst.)
  2. Dull Moment 4: Airplane announcer “ (people)
  3. Shining Moment -- 2 Hospital guest service “ (system)
  4. Shining Moment -- 10 -- the Motel “ (strat.)
4. My story: (Tell the Thousand Trails story before you go through handout)

Bob and I like to travel and go to parks and resorts. Our standard expectations are that the park guide will let us in, look at our pass, give us a used map, tell us to stay on the road etc. But at Thousand Trails, we really had our socks knocked off! AS we entered the guide says, “Bob are you luck to to be here, where y’all from? We told him Florida and that we wanted to see some owls. “Well, you’re just in the right place, there are 2 barn owls in the pine forest after the 3rd turn off. Just follow the path back to the pines. Also its quite cold right now. Would you like to go to the lodge? Hot coffee and chocolate are there.” Wow, were we impressed! And he looked so handsome in his bright, clean uniform.

**Summary:** You see go can meet people’s standard expectations or decide to knock their socks off. Last’ years great innovations or changes by a firm like Burger King are only seen by the customer today as standard. To stay competitive

# READINGS

## SERVICE AMERICA

We can learn a great deal about service by watching people who do it well as well as those who do it poorly. What follows is a collection of vignettes of service we find instructive, thought-provoking, and even inspiring. We provide here a variety of “dull moments”—mishandled moments of truth—and “shining moments”—moments of truth when human creativity and commitment have paid off.

We present first a series of dull moments. Each of them exemplifies in some way a failure of one or more of the three critical elements of the service triangle. Either the service strategy was faulty or nonexistent, the frontline people failed to come through for the customer, or the service system got in the way. As you read each of the following vignettes, picture the service triangle in your mind and make your own diagnosis. Which component or combination of components of the service triangle went wrong?

Similarly, as you read the shining moments that come after the dull moments, identify the key component you believe made the difference.

### **Dull Moment # 2**

Many years ago, the following story circulated widely. A man found a large bug in a box of a well-known, widely advertised breakfast cereal. He wrote an indignant letter to the headquarters of the food company that marketed the cereal. Within a matter of days, he received a profusely apologetic letter, signed by a vice president of the company. The letter assured him there would be a full investigation of the matter, and that the company was instituting special procedures to make sure that nothing like it would ever happen again. However, clipped to the letter, he also found an interoffice note sheet with the handwritten message: “George—send this crank the ‘bug letter.’ ”

### **Dull Moment # 4**

A group of passengers sitting on a commuter airplane in Buffalo, New York, got a disappointing message at about 10 one evening. The airplane was parked at the departure gate, during a brief stopover on its trip from Washington, D.C., to Toronto. Just about the time the passengers began wondering aloud why they were so long overdue for take-off, a gruff voice crackled over the intercom: “Please gather up your belongings and deplane the aircraft. This aircraft has a mechanical problem. It won’t be going to Toronto tonight. The gate attendant inside the terminal will tell you what flights are available to Toronto.”

# READINGS

## SERVICE AMERICA

### Shining Moment # 2

At a certain hospital in Memphis, when you arrive at the front door of the building to check in for your surgery, a doorman meets you at your car. He takes your overnight bag and escorts you to a special desk in the lobby. A bellman takes you, your visitors, and your belongings up to a preassigned room and helps you get properly situated.

When you are settled in, the patient-records representative visits you in your room and fills out the necessary admission forms. The hospital has adopted a "hotel" model for its layout and logistical procedures. Staff people prefer to use the term *guest* rather than *patient*. They try to provide as many of the features of a pleasant hotel stay as possible.

### Shining Moment # 10

A man wrote a letter to a small hotel in a Midwest town he planned to visit on his vacation. "I would like very much to bring my dog with me," he wrote. "The dog is well-groomed and very well-behaved. Would you be willing to permit me to keep him in my room with me at night?"

An immediate reply came from the hotel owner, who said, "I've been operating this hotel for many years. In all that time, I've never had a dog steal towels, bed clothes, silverware, or pictures off the walls. I've never had to evict a dog in the middle of the night for being drunk and disorderly. And I've never had a dog run out on a hotel bill. Yes, indeed, your dog is welcome at my hotel. And if your dog will vouch for you, you're welcome to stay here, too."

## MOMENTS OF TRUTH

**DULL MOMENT.** . . a negative customer interaction when the customer upset and says to him/her self (self-talk)

*“This is terrible”*

*“ I’ll never come here again.*

*“They don’t care.”*

**SHINING MOMENT.** . . a positive customer interaction when the customer surprised and delighted and says to him/her self (self-talk)

*“Wow!”*

*“This is tops!”*

*“They really care  
about me!”*

and to keep the customer coming back every organization needs to find new ways to “knock the socks off” its customers!

5. Let's look at the handout. Facilitator reads the standard expectations, then the enhanced expectations and also the experience detractors. (*if there were time you would look at the failpoints, underlying contradictions and do some tactical thinking*)

Look at next handout: Repair service. Read a bit in each column.

**Assignment:** (15-30 minutes)

In Mini-teams (3-5 Persons)

Now turn to the blank “Moments of Truth” sheet.

1. List 3 standard expectations of your customers when they:
  - come to your department
  - telephone you personally
  - make a request
2. List 5 enhancers you could do to show that you really care.
3. Write out report on overhead, or flip chart.
4. Prepare to read report to the total group.

**Team Reports:** (15 - 45 minutes)

15 minutes if people just read their report from their seat from their paper. You as a facilitator then work the group more like a conversation with questions like. What did you hear/ What did you like. Let's give that group a hand and clap.

45 minutes if each group comes up to the front and reports using overhead and/or flip chart paper

**Reflection After Each Report:**

1. What did you like that they plan to do?
2. What made sense?
3. What other enhancers could this team (or department) put into place?
4. Lead in applause.

**Close:** Let's remember some of these ideas for when we refine our Departmental goals and Objectives!

# MOMENT OF TRUTH:

Member stops at the entrance of the preserve for check-in

## *Thousand Trails*

### Experience Enhancers

- Ranger communicates a lot of pride in the preserve as if to say, "Boy, are you lucky to be here!"
- Ranger asks me "personal" questions. ("Where are you folks from?")
- Ranger demonstrates a sincere interest in me personally.
- Ranger offers me a glass of cold lemonade or a cup of hot chocolate.
- Ranger provides extra tips (e.g., best available spots to park my RV.)
- Ranger is attractive or handsome!
- etc.

### Standard Expectations

- Ranger is on duty.
- Ranger is polite.
- Ranger gives me a familiar greeting ("Welcome to Thousand Trails, my name is John Doe...").
- Ranger asks for my membership card and driver's license.
- Ranger looks appropriate to his or her role.
- etc.

### Experience Detractors

- No one greets me.
- Ranger is unfriendly.
- Ranger gives me no welcome, an unfamiliar one or delivers the welcome like a robot.
- Ranger asks for no identification or for only my membership card.
- Ranger is out of uniform.
- Ranger makes me question preserve security (over-weight, timid, etc.).
- etc.

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### Potential Failpoints

- Poor selection/training of ranger
- Uniforms unavailable/poor quality
- Out of date/stock materials
- Inadequate performance feedback
- No monitoring of check-in

# MOMENT OF TRUTH:

## The customer contacts the Repair Answering Center

### Experience Enhancers

- The operator had a melodious, well modulated voice.
- The operator communicated a sense of urgency.
- The operator really understood my problem / situation; had heard it before and knew just what to do.
- The operator apologized sincerely.
- The operator asked me about medical emergencies or other special situations which may warrant sooner service.
- The operator made some comment that let me know he/she was aware of my area (i.e. sounded like a neighbor).
- The operator offered to have work done at my convenience.

P) The repair operator diagnosed and/or corrected the problem while I was on the line.

P = Potential Enhancer

### Standard Expectations

- I will only have to call one number.
- I will call a local number.
- I will be treated fairly.
- The operator will speak clearly.
- The phone will not be busy.
- The operator will answer within a reasonable period.
- The operator will be a real person.
- The operator will speak pleasantly.
- The operator will listen to my problems in a manner that lets me know he/she understands my problem.
- The operator will seem competent, helpful and understanding.
- The operator will promise me a solution with a reasonable deadline.
- The operator will explain exactly what will happen next.

### Experience Detractors

- I can't understand the operator's words.
- I had to call more than once to get through.
- I had to listen to a recording that made me feel unwelcome.
- While I am on hold I get silence which makes me wonder if I am disconnected.
- The operator sounded like he/she was following a form / stock or routine questions.
- I felt the operator rushed me.
- I got mirandized. "Are you aware that there may be a ..."
- The operator told me to go to the Phone Mart to have my phone tested.
- I was not able to walk into an office and talk with someone personally.
- I had to call an "800" number.

## MOMENTS OF TRUTH

### MINI-TEAMS (*3-5 Persons*)

1. List 3 standard expectations of your customers when they:
  - come to your department
  - telephone you personally
  - make a request
  
2. List 5 enhancers you could do to show that you really care.
  
3. Write out report on overhead.
  
4. Prepare to read report to the total group.





# WORKSHOP PROCEDURES

## EMPLOYEE 10 COMMANDMENTS

### Context:

We've created the Customer's Bill of Rights, and developed ways we can 'knock the socks off' our customer (service enhancers) now let's look at the specific behaviours that are required in department.

### Discussion:

1. Let's look at the Employee Ten commandments (from either American Bankers Insurance Company, or Jackson Memorial Hospital).
2. Read the first 3. What is emphasized. what was the problem that required them to demand certain behaviors from their front-line people.
3. Continue discussion process on remainder of example.

### Individual Assignment:

1. Now, let's look at your department.  
List out 5-6 behaviors that are appropriate to serving your customers.
2. Now take your best 2, and write out 2 employee commandments.  
Use the format: *I will be. . . .* and *I won't . . .*

### Teamwork:

1. Share with team members and come up with 6 commandments for your Department. Write only if necessary.

### Reports/ Reflection:

1. Have each whole Department team stand at the front and present their work. Applaud enthusiastically!
2. Ask the group - which ones do you like? Which ones are very appropriate to this particular department?

Close: What should we do with these Commandments? How can you use them?  
You did a great job!

**EMPLOYEE 'TEN' COMMANDMENTS**  
**Jackson Memorial Hospital**

**EMPLOYMENT OFFICE AND PERSONNEL RECORDS**

As an employee,

1. I won't forget to follow-up on incomplete projects or inquiries.
2. I will not discuss personal matters in the presence of customers and employees.
3. I will, on an on-going basis, maintain an open communication line between hiring authority and myself.
4. I will always research a customer's question whenever I'm not sure of the answer.
5. I will maintain a professional empathy towards my colleague's abilities.
6. I will be warm, friendly and sensitive to my fellow customer's needs and concerns.
7. I will always display a positive optimistic attitude.
8. I will be accessible to employees and co-workers in every aspect.
9. I will put more effort in becoming error free.
10. I won't send customers away without helping them with their problems.

## **AMERICAN BANKERS EMPLOYEES' TEN COMMANDMENTS**

1. You never get in trouble for what you do, only for doing nothing. (It is right to say, "I was wrong.")
2. Stay out of the mainstream of competition and excel in product innovation and marketing.
3. To make a profit you must follow the A.B.C's --
  - Adequate premium,
  - Better claims handling.
  - Common sense underwriting (There are 100 cents in a dollar. Learn to add to 100.)
4. The most important person in the Company is the one who makes the sale. (Our agents and accounts are critical to our business. They will be treated respectfully and with dignity.)
5. Executive management has the prerogative and responsibility to question anyone and everything (so does everyone else.)
6. When you take over a piece of business ask, "Why are we so lucky?"
7. You don't get authority, you get accountability.
8. To be a low cost quality operation you must have productive, well-trained, motivated people.
9. The most important personal qualities are integrity and persistence.
10. Never back anyone into a corner.

# MISSION STATEMENT

**What is unique about -- --**

**Our COMMUNITY?**

**Our SERVICES ?**

**Our STAFF ?**

**EXCELLENCE is . . . .**

---

**Our Mission to the Community is . . . .**

**Our Mission to our Clients is . . . .**

**Our Mission to our Employees is . . . .**

## **MISSION STATEMENT**

**TAKE A PROACTIVE ROLE IN FULFILLING  
THE CURRENT AND CHANGING HUMAN RESOURCES NEEDS  
OF THE PUBLIC HEALTH TRUST BY PROVIDING  
QUALITY SERVICE, LEADERSHIP, SUPPORT AND  
PROGRAMS THAT MAXIMIZE EACH EMPLOYEE'S POTENTIAL.**

## **Ten Criteria for Evaluating Mission Statements \*\***

1. The mission statement is clear and understandable to all personnel, including rank-and-file employees.
2. The mission statement is brief enough for most people to keep in mind.
3. The mission statement clearly specifies what business the organization is in. This includes a clear statement about:
  - *What* customer or client needs the organization is attempting to fulfill, not what products or services are offered;
  - *Who* the organization's primary customers or clients are;
  - *How* the organization plans to go about its business, that is, what its primary technologies are; and
  - *Why* the organization exists, that is, what ultimate contribution the organization wants to make to the world.
4. The mission statement has a primary focus on a single strategic thrust.
5. The mission statement reflects the distinctive competence (or competencies) of the organization.
6. The mission statement is broad enough to allow flexibility in implementation but not so broad that it lacks focus.
7. The mission statement serves as a template for decision making within the organization.
8. The mission statement reflects not only the values, beliefs, and philosophy of operations of the organization but also the organizational culture.
9. The mission statement reflects achievable standards.
10. The mission statement is worded in such a way that it serves as an energy source and rallying point for the organization.

\*\* with permission, William Phieffer, Phieffer and Associates.

## EVALUATION

**1. I would rate this planning event: 1,2,3,4,5,6,7,8,9,10. (10 is highest)**

**My response is: \_\_\_\_\_**

**2. What do you feel was accomplished?**

**3. What was the most important insight you had about customer service?**

**4. What topics could have been discussed more?**

**5. Additional comments:**



# YOUR OPINION COUNTS.

We want to serve you better. The \_\_\_\_\_ Department would like your honest opinions on how we're doing! Please take 10 minutes and complete this survey and mail it to \_\_\_\_\_ by \_\_\_\_\_

**What do we do well?**

**Some examples are:**

**What do we need to improve?**

**Suggestions:**

Please circle the number which best describes your level of satisfaction, and rating of our services and support to your department. The rating scale is from 1 - 4, whereby 1 represents *not at all satisfied*, and 4 represents *fully satisfied*.

	IMPORTANCE				PERFORMANCE			
	Not Important	Very Important			Poor	Excellent		
	1	2	3	4	1	2	3	4
<b>Service Line</b> Your existing services meet my needs.	1	2	3	4	1	2	3	4
<b>Special Services</b> Staff tailor services for me when standard approaches won't work.	1	2	3	4	1	2	3	4
<b>Service Knowledge</b> They know the job and how to get things done.	1	2	3	4	1	2	3	4
<b>Responsible</b> They do not make excuses for delays or passes the buck.	1	2	3	4	1	2	3	4
<b>Follow-Up</b> Provides prompt & thorough response to complaints, questions etc.	1	2	3	4	1	2	3	4