

Customer Service Assessment

While each assessment is tailored for the organization, most have the following key objectives and elements in common:

Key objectives:

- Assess the organization's practices, procedures and policies in responding to customers' service concerns. Provide recommendations for service recovery improvements if required.
- Identify best practices, strengths, weaknesses, and opportunities for improvement in customer satisfaction management, including the development of a new service strategy if appropriate.
- Assess specific areas that include, but are not limited to monitoring performance; accountability; training; reward/recognition; communications; organizational support/buy-in (cultural support); as input for process, service and product improvement, managerial controls and governance structure.
- Assist the Senior Leadership Team in establishing guidelines for employee performance measurement and evaluations (including incentive plans) which have a distinct Customer Service bias.
- Arm others within the organization with the skill to do their own similar assessments in the future,
- Provide ideas on ways to prepare a unit for culture change as well as techniques to keep it alive and engaged once in progress.

Key Elements of our Assessment Approach

Step 1: Work Plan Review - We begin the project with an on-site meeting with the members of the Senior Leadership team to review and refine the project schedule, clarify roles, make requests, communicate needs, agree on boundaries, describe and agree on consulting norms.

Step 2: Desk Review - An important component of this effort is a study of background information including current customer information, strategic plans, performance management policies, performance evaluation criteria, employee attitude surveys, and the most recent customer service feedback.

Step 3: Culture Assessment - There are two components to Customer Service Management—one is how it is led and the other is how it is administered. The Culture Assessment focuses on how service is led. We believe this to be the most crucial part of our overall

understanding. The Culture Assessment uses a series of structured individual and focus group interviews designed to obtain an understanding of the organization's culture as it impacts the service delivery to customers. We typically pursue two focal points.

- A. Service Leadership Practices Assessment—to assess influential factors such as leadership modeling, actions congruent with vision-values-standards, top-down support, leadership training, leader's use of affirmation, leader communication styles, emphasis on inter-unit partnering, influence of external factors on service leadership (e.g., government agencies).
- B. Service Vision Assessment—to review the organization's Service Vision and Values with the specific goal of learning their use and impact.

Step 4: Review of Findings/Testing of Assumptions - We meet with the senior leadership team for a reality check on what we have learned to this point about the organization's culture. We are looking for confirmation that our overall findings are accurate and relevant or for suggested corrections and ways to validate the corrections.

Step 5: Cycle of Service Audit® - The Cycle of Service Audit® is a process used to gain a clear understanding of how service is actually delivered. The data that fuels this part of the audit comes largely through ride-alongs and sit-alongs within front-line organizations. Again, the focus is on the role that administration plays in influencing the service system. The audit includes three components: service charting of key services, an examination of the uses of real-time customer feedback in shaping service performance, and a study of the management of service recovery.

Step 6: Process and Practices Alignment - The Process and Practices Alignment is used to quickly ascertain the alignment that organizational processes and practices have with the service vision, values and standards. There are two parts to this discovery method.

- A. Service Hardware and Software Evaluation—to review the physical, technical, and administrative tools, systems, and techniques used to support effective service performance as well as the human, interpersonal or relationship parts of the culture that guide and incent effective service performance.

- B. Customer Service Dashboard® Evaluation—is a study of the way in which customer service measures are used to drive the organization toward service excellence as well as maintain its effectiveness.
- C. Internal Service Effectiveness—is a review of how colleagues serve each other across the organization. Our typical focus is on leadership partnering, silo elimination, cross-unit cooperation, and teamwork.

Step 7: Presentations of the Findings, Learning's (or Conclusions) and Recommendations - The final step is the preparation and presentation of the findings (facts and illustrative quotes gathered during discovery), learning's (key conclusions or interpretations), and recommendations (actions we believe are needed to correct or improve an issue or outcome). We work hard to ensure our conclusions are accurate and indisputable. We strive to make our recommendations pragmatic, yet visionary.