driven organizations and our analyses of the activities that make these organizations great. We’ve also studied the not so great to analyze what’s missing. Four components make up the framework: the Customer, the Service Environment (physical setting), the Service Delivery (employees), and the Processes.

You’ll notice that the customer is in the center of the framework shown in Figure 1.1—the customer experience being the driver of the service strategy. The service environment and service delivery components overlap the customer component since they are designed from the customer’s perspective. Finally, the processes component surrounds everything. Effective processes ensure that each element of the model is executed in an excellent and sustainable manner. Let’s take a closer look at each element.

The Customer

Most organizations say they put the customer at the center of everything they do. Experiencing the service they provide, however, quickly blows that theory. Their processes and policies demonstrate that the focus is on their convenience, not the customer’s. We’ve all been frustrated, for example, by phone trees that say; “For sales, press 1; for reservations, press 2; for customer service, press 3.” For real customer service we shouldn’t have to press
Figure 3.1 SIT—Service Improvement Team

Note: This organizational chart depicts one Leadership Action per member. In actual practice, a member may champion more than one Leadership Action, thereby reducing the size of the Service Improvement Team.
for leading the team. Figure 3.2 outlines the responsibilities of the chairperson.

The chairperson should be the most senior member of the Service Improvement Team, especially in the first year. For some of our client engagements, the president or CEO stepped into the chairperson role. Whatever you decide, a top executive Service Improvement Team chairperson sends a strong message regarding the importance of the service initiative and dramatically increases the likelihood of its success. It also raises the level of accountability regarding the team members’ commitments. As Bob Gillikin, former president (and Service Improvement Team Chairperson) of Cummins Southern Plains, told us, “The leader can’t just see this as a front-loaded process where he just says ‘do it’ and then steps away. The leader has to be personally committed and personally involved throughout the entire process. I was accountable, the Service Improvement Team members were accountable, and the entire Cummins Southern Plains organization was accountable for the success of this effort. The consistency of our combined efforts made it work.”

The success of the Cummins Southern Plains service initiative was (and continues to be) stunning. Their success has been due to having the right people on the Service Improvement Team with a “failure is not an option” mindset. Whoever your chairperson is, he or she must be supremely committed to the improvement process, be a risk taker, and, most important of all, possess the ability and authority to get things done.
Administrator

Think of someone in your organization who seems to have a special ability to coordinate and stay on top of a variety of cross functional activities and details—someone who’s able to somehow keep everyone informed of what’s going on and understands how to get around the bureaucracy in order to get answers and take action; someone who, for some reason, really enjoys doing all of the above. That person would be the ideal Service Improvement Team administrator. In a large or complex organization, the administrator may be the one person assigned full time to the Service Improvement Team. This individual has a lot to do to make sure everything is coordinated. Figure 3.3 outlines the responsibilities of the administrator.

The administrator can best be described as a project manager and shouldn’t have responsibility for any specific Leadership Action. Just staying on top of all of the activity and keeping communication flowing will be a big job. This person must be detail oriented and able to handle a lot of information. It’s a critical position, so look for someone who loves this type of work.

Keeping track of deadlines and commitments is a significant part of the administrator’s job, and Figure 3.4 provides an example of a tracking sheet (abbreviated) that the administrator can use to track all of the activities. It’s a living document, with

- Work with the Chairperson in developing Service Improvement Team agendas.
- Handle the logistical details of all Service Improvement Team meetings.
- Record all discussions and decisions from the Service Improvement Team.
- Follow up on all team member assignments to track progress and ensure completion.
- Develop and administer a master document that tracks all aspects of the service improvement process.

Figure 3.3 Responsibilities of an Administrator
### June Report – 7/24 Conference Call

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Progress Report</th>
<th>Due Date</th>
<th>Comments/Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communication – John Smith</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Newsletter article written by CEO introducing the service initiative.</td>
<td>Article will be ready for September newsletter.</td>
<td>July 31</td>
<td>On track.</td>
</tr>
<tr>
<td>2 Posters with logo, Service Philosophy/Standards communication kit sent to all branches and departments.</td>
<td>Kit components complete. Will send out when dept. heads are updated on their responsibilities.</td>
<td>July 31</td>
<td>New date for distribution is August 15th, following the department head meeting.</td>
</tr>
<tr>
<td><strong>Training and Education – Jane Johnson</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Put together training subcommittee.</td>
<td>Getting input from SIT members. Two recruits at this point.</td>
<td>June 19</td>
<td>Suggestions for members needed by end of week.</td>
</tr>
<tr>
<td>2 Schedule employee workshops and communicate schedule to the field.</td>
<td>Schedule complete. Will be distributed following initial company-wide communications.</td>
<td>June 22</td>
<td>On track.</td>
</tr>
</tbody>
</table>

**Figure 3.4 Service Improvement Team Tracking Sheet** (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
### Measurement – Bill Watson

<table>
<thead>
<tr>
<th></th>
<th>Task Description</th>
<th>Meeting Details</th>
<th>Date</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Review current service quality measurements.</td>
<td>Meetings with departments to identify current customer service measurements.</td>
<td>July 1</td>
<td>List of all current service quality measurements.</td>
</tr>
<tr>
<td>2</td>
<td>Develop branded measurement charts to distribute to field.</td>
<td>Meeting with vendor to produce the charts. Have sent logo.</td>
<td>July 15</td>
<td>On track.</td>
</tr>
<tr>
<td>3</td>
<td>Develop baseline measurements that will track overall impact.</td>
<td>Meeting with executive team to discuss key measures.</td>
<td>July 10</td>
<td>Determine 3-4 overall organizational baseline measurements.</td>
</tr>
</tbody>
</table>

**Figure 3.4 (Continued)**
Clearly, all Service Improvement Team members must have a passion for service excellence and demonstrate long-term commitment to the process. Each member must be counted on to follow through on assignments and responsibilities.

Creating a Team Charter

A team charter provides the Service Improvement Team with a clear sense of mission and a set of operating guidelines. Figure 3.6 provides a template that should help you get started developing your own charter. Some organizations have viewed creating a charter as unnecessary and then later regretted not taking the step to create one. You may think that everyone is clear on the direction of the group but later find out there are misunderstandings regarding commitments and responsibilities. Creating a charter at the beginning eliminates a lot of headaches later on. Signing the charter signifies that each member understands what the Service Improvement Team is all about and what’s expected of the membership.

Service Improvement Team Meetings

You probably feel that you already have too many meetings to attend, and you probably do. The following note was anonymously sent around one organization:
PURPOSE:
To design the plan, provide training, and implement the Service Improvement Process at [company name].

MEMBERSHIP:
The first Service Improvement Team will be comprised of the highest level of authority in each of the major areas of operation in the organization; in addition, an administrator will also serve on the team. The members of subsequent Service Improvement Teams are nominated by the current Service Improvement Team and approved by the senior executives. The chairperson of subsequent Service Improvement Teams will be selected by the CEO and also appoint an administrator. Members are expected to serve for a minimum of one year.

TEAM RESPONSIBILITIES:
1. Set the direction for the service improvement initiative.
2. Document the role and responsibilities of the members, chairperson, and administrator.
3. Assign a Leadership Action to each Service Improvement Team member.
4. Determine time schedules and goals for each Leadership Action.
5. Ensure consistency of all Service Improvement Team plans with the business objectives of the organization.
6. Review and approve plans developed by all Service Improvement Team subteams.
7. Coordinate Service Improvement Process plans and assist areas with implementation.
8. Observe the progress, successes, and challenges resulting from implementation, and make adjustments as needed.
9. Designate a succession plan for turning over the Service Improvement Team into the next service improvement cycle.

INDIVIDUAL RESPONSIBILITIES:
1. Attend all Service Improvement Team meetings or provide a representative. Be prepared for all meetings.

Figure 3.6 Sample Service Improvement Team Charter (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
The first thing we do at our meetings is read the minutes from our last meeting. If it only takes three minutes to describe it, why does it take three hours to do it?

Service Improvement Team meetings are not designed to be just another set of meetings in which talk occurs but no action results. The meetings focus on three areas: progress, plans, and challenges. Commitments are made and documented, input is received, communication takes place, and the members then get on with the work of executing the service improvement plan. The real work takes place outside of the meetings.

2. Follow through on all commitments made as champion of one of the Leadership Actions.
3. Create and lead a subteam for the purpose of developing and implementing the strategy of the assigned Leadership Action.
4. Assist other team members as needed.
5. Be an ambassador of the service improvement initiative.

MEETINGS:
- Meetings will be held biweekly initially, then monthly.
- Meetings may be held via teleconference if needed.
- Meetings will be conducted following an agenda published by the administrator in advance of the meeting.
- The administrator will record all decisions and actions on a tracking sheet. Meeting minutes will also be kept as a record of discussions that take place. The tracking sheet and meeting minutes will be updated and distributed to all members of the Service Improvement Team within 48 hours following the meeting.

Date: ____________________
Signatures of Service Improvement Team members:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Figure 3.6 (Continued)
Service Improvement Team
First Meeting Agenda

I. Review purpose of the improvement effort and the role of the Service Improvement Team – Chairperson
   a. The purpose of the service improvement effort is to create a sustainable culture of service excellence throughout every facet of the organization
   b. The purpose of the Service Improvement Team is to ensure that each Leadership Action of the improvement effort is executed effectively and in concert with the other Leadership Actions

II. Review and sign the Service Improvement Team charter – Chairperson
   a. Questions or concerns regarding the charter
   b. Reinforcement of commitment required from each member of the team
   c. Signatures of the team

III. Schedule six months of Service Improvement Team meetings – Chairperson and Administrator
   a. Meetings should be a combination of face-to-face meetings and teleconferences. Face-to-face meetings, while inconvenient, will be most productive.

IV. Review sample Service Improvement Team commitment tracking sheet – Administrator
   a. Adapt as necessary
   b. Discuss distribution plan

V. Discuss initial Service Improvement Team activities – Entire team
   a. Strategy for development of the Service Philosophy and Standards (Chapter 4)
      1. Assign action steps
   b. Initial communications plan (Chapter 5)
      1. Assign action steps

VI. Develop plan for subteam – Entire team
   a. Selection criteria for subteam members
   b. Discussion of potential candidates
   c. Plan for contacting candidates

Figure 3.7 Sample Meeting Agenda (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
group. Take your own organization’s situation into account. One client decided that because their operation is spread across three states they would meet face to face every other month and use conference calls for the other meetings.

Figure 3.9 shows a list of recommended ground rules to help keep your Service Improvement Team meetings focused and productive. We suggest you include the list with the agenda you send to your participants and post it in the meeting room,

<table>
<thead>
<tr>
<th>Service Improvement Team Ongoing Meeting Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Welcome – Chairperson</td>
</tr>
<tr>
<td>a. Review agenda</td>
</tr>
<tr>
<td>II. Service improvement initiative status check – Entire team</td>
</tr>
<tr>
<td>a. Discussion of overall progress</td>
</tr>
<tr>
<td>b. Success stories</td>
</tr>
<tr>
<td>III. Report out of each Leadership Action – Designated champions</td>
</tr>
<tr>
<td>a. Progress made on action items</td>
</tr>
<tr>
<td>b. Challenges encountered</td>
</tr>
<tr>
<td>c. Next steps</td>
</tr>
<tr>
<td>IV. Conclusion – Chairperson</td>
</tr>
<tr>
<td>a. Review of commitments – Administrator</td>
</tr>
<tr>
<td>b. Confirmation of next meeting</td>
</tr>
</tbody>
</table>

Figure 3.8  Service Improvement Team Ongoing Meeting Agenda (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)

Note: It’s important to reinforce the linkages between each Leadership Action – each action is part of a cohesive whole. During the report outs, communication or coordination gaps may appear that need to be addressed.
group. Take your own organization’s situation into account. One client decided that because their operation is spread across three states they would meet face to face every other month and use conference calls for the other meetings.

Figure 3.9 shows a list of recommended ground rules to help keep your Service Improvement Team meetings focused and productive. We suggest you include the list with the agenda you send to your participants and post it in the meeting room,

1. Assign action steps

VII. Conclusion – Chairperson
   a. Review of commitments
   b. Confirmation of next meeting

Figure 3.7 (Continued)

Service Improvement Team
Ongoing Meeting Agenda

I. Welcome – Chairperson
   a. Review agenda

II. Service improvement initiative status check – Entire team
   a. Discussion of overall progress
   b. Success stories

III. Report out of each Leadership Action – Designated champions
   a. Progress made on action items
   b. Challenges encountered
   c. Next steps

IV. Conclusion – Chairperson
   a. Review of commitments – Administrator
   b. Confirmation of next meeting

Figure 3.8 Service Improvement Team Ongoing Meeting Agenda (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)

Note: It’s important to reinforce the linkages between each Leadership Action – each action is part of a cohesive whole. During the report outs, communication or coordination gaps may appear that need to be addressed.
at least for the first few meetings. Referring back to these ground rules can keep the discussion from being sidetracked or derailed completely.

Subteams

We’ve referenced “subteams” several times in this chapter, and here we’ll describe their role in the initiative.

The majority of the Service Improvement Team’s work is actually done by a series of subteams, which are formed to execute the plans described in each chapter of this book. For example, the Communications subteam, led by the champion, puts together the communication plan, develops and implements the communication tools, keeps all communications fresh and up to date, along with the rest of the tactics described in Chapter 5.
It’s a rare organization that can have poor internal service while delivering great external service. Every division, every department, and every employee must understand how their jobs impact the ultimate, revenue-generating customer. If someone states, “This service philosophy doesn’t apply to my group because we are so far removed from the ultimate customer,” we would question the need for that group’s existence. If they don’t impact the final customer, why does the function exist? By the way, simply make this observation and watch how fast the group’s connection to the customer is made. Service excellence must be an organization-wide priority if the effort is to be successful.

**Developing the Service Philosophy**

The Service Philosophy answers two questions:

1. What do we do?
2. How do we do it?

<table>
<thead>
<tr>
<th>What do we do?</th>
<th>How do we do it?</th>
</tr>
</thead>
<tbody>
<tr>
<td>“We create happiness.”</td>
<td>“By providing the finest in entertainment for people of all ages, everywhere.”</td>
</tr>
<tr>
<td>“We enrich lives.”</td>
<td>“By working together to create trust and confidence in all we do.”</td>
</tr>
</tbody>
</table>
Developing the Service Improvement Core Tools

“We build life-enhancing relationships.”

“We fulfill our guests’ dreams.”

“We change lives.”

“We create excitement.”

“We build life-enhancing relationships.”

“We fulfill our guests’ dreams.”

“We change lives.”

“We create excitement.”

“We build life-enhancing relationships.”

“We fulfill our guests’ dreams.”

“We change lives.”

“We create excitement.”

We’ve found that the best approach to developing a Service Philosophy is to put together a cross functional group of employees, from all levels of the organization, for a facilitated one-day workshop. The first part of the workshop clearly outlines the objective and purpose of a Service Philosophy. The rest of the session is devoted to brainstorming the answers to customer-related issues and using the responses to then craft the Service Philosophy.

Breaking the development team into small groups and having each group come up with their own ideas and then bring these ideas back to the large group works well. It allows you to cut and paste between the group’s ideas to come up with a short, simple statement that everyone likes and agrees to. Figure 4.1 provides a worksheet that can be used for brainstorming purposes.

We’ll warn you that it’s hard to keep people from focusing on the tangible product or service or from going to the trite and boring response of “we’re selling customer satisfaction.” The Service Philosophy must be inspiring—something that motivates the employee beyond the mechanical tasks of his or her job.

We’ll also warn you that the dynamics of the brainstorming session can get intense, and sometimes mind-numbing, as every word of the Service Philosophy is debated, revised, and re-ordered. The frustration is worth it, however, because the team is forced to wrestle with what the organization really provides to customers. Just remember to keep the Service Philosophy simple and ensure it answers the two questions: What do we do? and, How do we do it?
The Service Philosophy

A Service Philosophy is a brief, motivating statement that clearly defines what customers should experience during any encounter with your organization. It explains what you do, and how you do it. What is the Service Philosophy for your organization? What do you want your employees to focus on as they interact with customers? In other words, what do you want your employees to “create”?

1. At the conclusion of any interaction with our organization, what words or phrases describe the emotions our customers should feel?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. How do we want customers to describe our organization to others?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. With the responses to questions 1 & 2 in mind, what should be the Service Philosophy of our organization?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Figure 4.1 The Service Philosophy (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
cast member noticed a guest in need of directions or help, who happened to be on Main Street, USA, the cast member is fully empowered to assist the guest even though there is a “violation” of the show standard. Why is this violation acceptable? Because courtesy is a higher priority than show. See how it works?

Figure 4.2 provides several examples of Service Standards clients have developed.

The majority of the time, all of the Service Standards are working together with no need to worry about their hierarchy. The moment the employee needs to make a service decision, however, the hierarchy of standards becomes critical. For instance, as an employee working in the bank example in Figure 4.2, I am encouraged to get an answer to a request back quickly for a customer. If, however, I am not sure of the answer, is it better to respond with what I think or know for certain is the answer? I should know for certain what the answer is, because accuracy takes priority over responsiveness. It would be better, even if it took a little more time, to make certain I have the correct answer for the customer. The Service Standards provide employees with guidance in making effective service decisions. Later in the chapter we’ll describe the process for prioritizing the Service Standards.
prioritization, test out your Service Standards on various situations that might occur in your organization. Does the order make sense? You’ll probably move things around a bit as you work through this exercise, and you may find yourself frustrated. Frustration is okay because you are forcing yourself to validate all of your hard work. Review the service standard examples earlier in the chapter and note the logic behind the prioritization.

**Defining the Service Standards**

Once you have prioritized the Service Standards, the next step is to define them so everyone knows exactly what is expected and included in each behavior. Figure 4.4 shows how one organization defined their Service Standards to make it very clear to all employees what was expected. Note how each Service Standard contains a descriptor of what the standard means, followed by several bullet points.
- **Dependability**—We “do the job right.” We perform with precision and ensure error-free interactions with each customer.
  - Maintain the absolute privacy/confidentiality of the customer transaction.
  - Pay attention to every detail of the transaction.
  - Know all bank products or where to obtain correct information.
  - Listen carefully to ensure true understanding of the customer’s need.
  - Ensure the customer’s understanding of the transaction.

- **Accessibility**—We are easy to do business with. We are consistently available and responsive to our customers and always ensure that their experience with us is efficient and timely.
  - Acknowledge the customer promptly.
  - Conduct each transaction efficiently.
  - Keep all commitments/return calls promptly.

- **Collaboration**—We care about the long-term success of each customer and strive to build trust-based, collaborative relationships.
  - Treat customers as welcome guests.
  - Learn and use customers’ names.
  - Look at each transaction as an opportunity to build trust with the customer.
  - Focus on building customer partnerships that are life-long and strong enough to pass to the next generation.

- **Advice**—Our customers learn from us and are better because of the relationship.
  - Inform customers of new, beneficial products that provide solutions to their needs.
  - Constantly learn about customers and help them to identify their needs.
  - Always be on the lookout for ways to further assist each customer.

---

**Figure 4.4 Service Standards—Example**
Process Analyzed: _______________________

**Step 1:** Describe each step of the process through the “lens of the customer.”

1. The customer…
2. The customer…
3. The customer…
4. The customer…
5. The customer…
6. The customer…
7. The customer…
8. The customer…
9. The customer…

**Step 2:** For each block identified in step 1, describe what would be considered mediocre service and what would be considered excellent service.

<table>
<thead>
<tr>
<th>Block Number</th>
<th>Mediocre Service</th>
<th>Excellent Service</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 4.5  Service Map—Template (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
something like, “Next we process the paperwork,” the facilitator should ask, “While we’re processing the paperwork, what’s the customer doing?” The answer in this case is that the customer is waiting while the paperwork is processed. Now you have something to work with since the step is now seen through the lens of the customer.

After completing the Service Map and ensuring that each step is described from the customer’s perspective, the next step is to look at each component of the Service Map and ask, “What would mediocre service look like at this step?” The reason it’s important to define mediocre service is that in many cases, after describing mediocre, it becomes apparent that at some of the steps the service currently delivered is indeed mediocre. Remember, we’re not talking about poor service; we’re talking about mediocre, transaction-like service. What we’ve found in conducting countless Service Mapping sessions with clients is that, while they may be providing excellent service at some of the steps, they’re now looking at the entire experience and can usually see that there are many opportunities throughout the experience for improvement.

<table>
<thead>
<tr>
<th>Block Number</th>
<th>Mediocre Service</th>
<th>Excellent Service</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Step 3:** Choose one or two of the steps to focus on improving first, then move on to other steps that are determined to be areas of opportunity.

**Figure 4.5 (Continued)**
After describing mediocre service, the next step is to describe excellent service at each step. A word of caution here. When team members are brainstorming what excellent service would look like, don’t let the words, “We can’t do that, because . . . ” creep into the conversation. The purpose of the discussion is to describe excellent service, and you don’t want to censure yourselves at this point. You may not be able to implement every idea presented, but it’s better to set your sights high and get as close to the ideal as possible than to stifle conversation early and only generate ideas that are slightly above mediocre.

The final step of the Service Mapping session is to take the descriptions of excellence and re-map the experience using these descriptions. Figure 4.6 shows an example of a completed

![Service Map](image)

**Figure 4.6 Service Map**
# Everything Speaks Checklist

Area: Hospital Entrance/Admitting

Date: _______________

Conducted by: _______________________

## Parking/Outside Entrance

<table>
<thead>
<tr>
<th>Item</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking Lot Condition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Landscape Condition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Cleanliness</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lighting Fixtures</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional Comments: ___________________________________________________
_____________________________________________________________________
_____________________________________________________________________}

## Lobby Area

<table>
<thead>
<tr>
<th>Item</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleanliness</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lighting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furniture Condition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Window Cleanliness</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays, Brochures, etc. Stocked, Clean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Condition</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional Comments: ___________________________________________________
_____________________________________________________________________
_____________________________________________________________________}

**Figure 4.7** Everything Speaks Checklist  (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
### Admitting Area

<table>
<thead>
<tr>
<th>Item</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free of Clutter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies (Forms, Pens, Cards, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lighting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appropriate Seating Available</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condition of Furniture</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Maintenance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confidential Information Out of View (Files, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional Comments:____________________________________________________________________
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### Restrooms

<table>
<thead>
<tr>
<th>Item</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Action</th>
</tr>
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<tr>
<td>Supplies</td>
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<tr>
<td>Overall Cleanliness</td>
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<td>Lighting</td>
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<td>Overall Maintenance</td>
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Additional Comments:____________________________________________________________________
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**Figure 4.7** *(Continued)*
company made up of ten banks, has truly mastered the art of service communication. Messages to employees about the service initiative are everywhere you turn. In addition to bulletin boards, computer screensavers, newsletters, rallies, and recognition events, they have what they call a WOW news release, a short e-mail blast to all employees that shares a story of service excellence in action. Figure 5.1 provides an example of a WOW news release. They've also instituted regular “20-Minute Meeting”

Figure 5.1 WOW News Release Example
topics, which reinforce some aspect of service excellence. Managers receive a facilitator guide for discussing the topic with employees along with interactive participant materials designed to involve employees in the discussion (Figure 5.2).

The point is to be creative in using every means available to communicate the Service Philosophy and Service Standards. As you go through the information in this chapter, consider all of the media available in your organization for communicating the message of service excellence.

---

**Everything Speaks**

**Participant’s Worksheet**

Who is my favorite person to see in public or meet with or have lunch with? Why?

Would anybody list me as their “favorite person” to see in public? Why or why not?

Do I treat others fairly and kindly outside of work?

How do I behave when I think nobody I know is watching me?

3 behaviors I will practice every day in 2010:

Everything Speaks – I am the bank!

**Figure 5.2 Everything Speaks Participant’s Worksheet**
A hospital, for example, scheduled large group management meetings in which customer service and the upcoming initiative were discussed. This approach gave the managers an opportunity to gain an understanding of the initiative’s basic framework, ask questions, and express concerns. The hospital’s CEO actively participated in these meetings. Managers were encouraged to talk about the basics of the service initiative with their respective teams. Reading material was suggested to the managers. (At the risk of seeming self-serving, you may want to provide managers with a copy of this book to accelerate their understanding of the process.) A couple of weeks later, all frontline employees attended similar meetings that introduced the service initiative. Newsletter articles, hospital-wide e-mails, bulletin boards, and other communication tools supported these meetings. Many organizations have created logos that represent their service improvement efforts, putting them on all initiative-related communications.

Figure 5.3 highlights the components of effective communication during the awareness stage.

You should feel comfortable saying ‘‘I don’t know’’ at this stage of the game. You don’t have all the answers. Employees are going to help come up with the answers. During the awareness stage, you just want everyone to know that change is coming—stay tuned.

| What employees need: Information |
| Communication Approach: |
| • Why the organization is focusing on customer service. |
| • The basic approach the organization plans to take with the service initiative. |
| • Why employee involvement is important to the success of the initiative. |
| • What type of communication employees can expect to see. |
| • Commitment from top leadership. |

Figure 5.3 Communication During the Awareness Stage
that awkwardness plays in the process. Employees need to wrestle with the concepts. They need to adapt the tools to their world. They need to express their doubts, questions, and confusion. During the awkwardness stage you can expect to see some employees embrace the service improvement effort wholeheartedly. You can expect to see others reject it completely. Most employees approach the effort with some skepticism but are willing to give it a try. The primary mindset at this stage is usually, “How long will it last?”

During the awkwardness stage, employees need reassurance. Remember learning to ride your first two-wheeled bike? It’s likely that your mom or dad ran along beside you, holding you up as you wobbled down the sidewalk. As you became more confident, they let go. But chances are they still ran along beside you, huffing and puffing, shouting encouragement, reassuring you, and being there in case you fell. Finally, they let you ride off once you felt confident.

Your employees need reassurance that they’ll be supported to succeed in the service improvement effort. They need to know that you aren’t saying, “Just get on the bike and ride, or else!” Figure 5.4 highlights the components of effective communication during the awkwardness stage.

Employees need to know that the organization is committed to the effort in the long term. If they see communication beginning to drop off, or worse yet stop, credibility is lost very quickly. Keep the service improvement message highly visible as employees work their way through the awkwardness stage.

What employees need: Reassurance
Communication Approach:
• Stories and examples of service excellence in action.
• Coaching on using the service improvement tools.
• Recognition of employees who are providing great service.
• Ongoing commitment to getting input from employees about the service improvement initiative.

Figure 5.4 Communication During the Awkwardness Stage
effort was a yearly best practices fair. Departments from all over the company were invited to create booths highlighting things that they were doing to create service excellence. Internal and external service were both highlighted. Cast members explored the fair to see what was happening around the company. Everyone, especially the executive team, was blown away by the things that were happening. The results were fantastic:

- Best practices were shared around the entire organization.
- Guests were continually wowed by improved service approaches.
- Cast members saw that service was an ongoing priority.
- Management was exposed to the creativity of the cast for elevating the guest experience.

These best practice fairs were used as a tool to creatively communicate “what’s new.”

Figure 5.5 highlights the components of effective communication during the assimilation stage.

Your main objective during the assimilation stage should be to keep the momentum of the customer service effort going. Be creative and relentless. Keep in mind that radically new service ideas will travel through the awareness and awkwardness stages again before being assimilated into day-to-day behaviors. It’s a never-ending process.

What employees need: *What’s new about the service effort*

Communication Approach:

- Direction and priorities of the Service Improvement Team.
- Success stories—service heroes.
- Best practices.
- Satisfaction measurement results.
- Refreshed and renewed collateral materials.
- Ongoing involvement opportunities.

Figure 5.5  Communication During the Assimilation Stage
DAY 1

8:00 AM–8:30 AM  Arrivial/Breakfast

8:30 AM–8:45 AM  CEO Kickoff
- The role of the service improvement effort in the overall company strategy

8:45 AM–10:15 AM  Components of a Service-Driven Culture/Language of Service
- The customer service model:
  - Lens of the customer
  - Everything Speaks
  - Create a Wow
  - Processes

10:15 AM–10:30 AM  Break

10:30 AM–10:45 AM  Introduction of the Nine Leadership Actions

10:45 AM–12 noon  Leadership Action 1—The Service Improvement Team
- Introduce members of the Service Improvement Team
- Purpose of the Service Improvement Team
- Executive expectations of the Service Improvement Team
- Service Improvement Team expectations of executives

12 noon–1:00 PM  Lunch

1:00 PM–2:30 PM  Leadership Action 2—Service Improvement Core Tools
- Overview of the Service Philosophy and Service Standards
- How the Service Philosophy and Service Standards were developed
- Service Mapping
- Everything Speaks Checklist

Figure 6.1  Executive-Level Service Improvement Training Agenda (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
• Examples/Questions
• Application

2:30 PM–2:45 PM Break

Leadership Action 3—Communication
• Overview of service improvement communication strategy
• Stages of Understanding
• Executive role in initial and ongoing awareness

3:30 PM–4:15 PM Leadership Action 4—Training and Education
• Introduction of the overall service improvement training plan
• Registration process
• Pre-training expectations (what trainees should know before attending)
• High-level overview of manager and frontline training sessions
• Review changes to new-hire orientation
• Executive role in training support

4:15 PM–4:30 PM Wrap Day 1

DAY 2

8:00 AM–8:30 AM Breakfast

8:30 AM–9:00 AM Review of Day 1/Q&A

9:00 AM–10:00 AM Leadership Action 5—Interviewing and Selection
• Selecting for talent
• Modeling service excellence in the interview process
• Executive role in Interview and Selection process
  - Staffing with A-players

10:00 AM–10:15 AM Break

10:15 AM–11:00 AM Leadership Action 6—Measurement
• Overview of baseline Measurement plan
• Potential day-to-day service Measurements
• Executive role in Measurement process

Figure 6.1 (Continued)
Leadership Action 7—Recognition
- The role of Recognition in service improvement
- Current Recognition tools in place/needed adjustments
- Executive role in Recognition

Leadership Action 8—Service Obstacle System
- Discussion of potential barriers to service improvement
- Overview of the service improvement process
- Executive role in service improvement

Leadership Action 9—Management Accountability
- Importance of “walking the talk”
- Overview of Management Accountability processes
- Executive role in Management Accountability

Executive To Do’s
- Expectations for executive team
  - Ensure that all managers and frontline employees attend the service improvement training
  - Prepare your managers for attendance in the upcoming manager workshops
  - Begin using the service improvement tools—i.e., the Service Map—Everything Speaks Checklist, in your own areas
  - Begin all meetings with service-related issues
  - Begin recognizing excellent service behaviors as soon as you see them
  - Identify potential areas for service improvement within your area of responsibility
  - Walk the customer service talk. Be a role model
  - Catch people doing things right

CEO Wrap-up

Figure 6.1 (Continued)
Welcome Session/Introduction

- Objectives of the service improvement process
- Overview of service improvement process to date
- Benefits to the individual and the organization

Components of a Service-Driven Culture/
Language of Service

- The customer service model
  - Lens of the customer
  - Everything Speaks
  - Create a Wow
    - Review Service Philosophy and Service Standards
  - Processes:
    - Examples
    - Service Mapping
    - Everything Speaks Checklist

Manager Tool 1—Service Mapping

- Overview of service mapping technique
- Examples of service mapping
- Group application—case study

Manager Tool 2—Service Measurement

- Overview of baseline measurement plan
- Examples of day-to-day service measurements
- Group application—case study

Manager Tool 3—Everything Speaks Checklist

- Review checklist (or draft of checklist)
- Guidelines for effective use of the checklist
- Group practice

Manager Tool 4—Service Obstacle System

- Discussion of potential barriers to service improvement

Figure 6.2 Manager-Level Service Improvement Training Agenda (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
15 min.  Welcome/Opening
- Service-oriented participation activity
- Objectives of the service improvement process
- Overview of the service improvement process to date
- Significance of the process to the company and employees

10 min.  Introduction of the Customer Service Model

20 min.  The “Lens of the Customer”
- Definition of the “lens of the customer”
- Interactive case study identifying behaviors that demonstrate an understanding of the customer’s lens
- Service mapping

20 min.  “Everything Speaks”
- Definition of “everything speaks”
- Interactive identification of environmental distracters
- The Everything Speaks Checklist

20 min.  “Creating Service Wows”
- Service wows in the real world
- Interactive identification of behaviors that frustrate customers
- Participant discussion of local best practices for exceeding expectations

20 min.  Introduction of Service Philosophy and Service Standards
- Quick overview of the Service Philosophy and Service Standards
- Interactive exercise applying the standards to specific situations
- Individual action plans
  - Personal application of the Service Standards

15 min.  Interactive Review of Content/Next Steps

2 hours total

Figure 6.3  Frontline-Level Service Improvement Training Agenda (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
10 min. **Welcome Session/Overview**
- “In this workshop we will:”
  - Discuss progress made with the service initiative
  - Review core elements of the initiative
  - Discuss taking customer service to the next level
- Table activity—Best example of creating a great customer experience since launch of the initiative

10 min. **Progress to Date**
- Overall purpose of the initiative
- What the Service Improvement Team has accomplished
  - Business results

20 min. **Review of the Service Excellence Model**

- Customer—look at everything “through the lens of the customer”
  - Examples of “through the lens of the customer” behaviors
  - Pop-up examples from participants
- Environment—pay attention to detail because “everything speaks”
  - Examples of how “everything speaks” applies to your work environment
  - Pop-up examples from participants
- Delivery—create a wow
  - Examples of creating customer service wows
  - Refer to examples from opening activity
  - Additional pop-up examples from participants

Figure 6.4 Service Excellence Refresher Workshop (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
20 min. **Service Philosophy and Standards**
- Contest for correctly reciting the Service Philosophy and Standards word-for-word
- Table activity applying each of the standards to the specific roles of participants
  - Group report outs

5 min. **Brief Recap of the Leadership Actions**
1. Service Improvement Team
2. Service Improvement Core Tools
3. Communication
4. Training and Education
5. Interviewing and Selection
6. Measurement
7. Recognition
8. Service Obstacle System
9. Accountability

45 min. **Participant Rating on Success of Leadership Actions 3–10**
- Flipchart pages taped to wall with Leadership Actions (Flipchart Example)

- Provide each participant with enough “sticky dots” for each of the Leadership Actions

**Figure 6.4 (Continued)**
An employee’s first day is the most important day of the employee’s tenure with your company. Anything that does or does not happen on the first day remains with the employee forever. Be sure to adapt the frontline service training session for inclusion in your company’s new-hire orientation. If you only provide service training for your current employees and make no adjustment to your orientation process, it’s like bailing water out of a boat with a hole in it. New employees just keep pouring into the organization without exposure to the service concepts we’ve been discussing. Certainly, they’ll get some of the information from their managers, if their managers have bought in and are on the ball. But starting a new employee out on the right foot with consistent information regarding the company’s approach to service is priceless. You don’t get that chance back. While you’re
Part of your job in interviewing applicants, then, is to determine if the applicant has a desire to make things look right. Let’s say, for example, a job applicant had previous experience working at a fast-food restaurant. You might ask, “How did you decide when an order was ready for the customer?” Your potential superstars will answer that, not only were all of the food items there, but also that everything looked good on the tray before giving it to the customer. Are there many fast-food employees that actually make sure things look good? No. That’s the point. You want to find those talented few who are wired to make sure that things look right.

Keep in mind that the list of questions in Figure 7.1 is provided as a thought starter for meeting one-on-one with some of your employees to begin uncovering superstar talents. You’ll have to

- What part of this job is most rewarding for you?
- When you are a customer, what does great service look like to you?
- What tools are of greatest help to you in doing your job?
- What do you think is expected of you as an employee?
- What do you think it takes to be considered great at your job?
- What do you find most frustrating about serving our customers?
- What does a leader do to get your best performance?
- What makes you feel successful at your job?
- How do you get everything done that needs to be done in your job?
- What frustrates you as a customer?
- What factors need to be in place to motivate you to do your best work?
- What is the best part about serving our customers?
- What role do fellow employees play in your satisfaction at work?
- How would you describe excellent performance in a job such as yours?
- Why is your role important to the organization?

Figure 7.1 Sample Talent Questions for Current Employees (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
To meet the customer’s expectations, we must capture the behaviors of top-performing tellers, as an example, when ‘they are doing their job,’ and create a Benchmark Job Profile. The Job Profile includes the competencies and key behaviors of a particular position when those service behaviors are exceeding the customer’s expectations. These are then used in the selection process, training of new employees, and coaching new and existing employees toward top performance.”

According to Gary Gragg, First Financial Bankshare’s co-champion of the Interviewing and Selection Leadership Action, all of this takes time. “But we don’t apologize for taking a long time to make the selection,” says Gragg. “We know how important it is to hire the right person.”

Figure 7.2 shows a portion of the interview guide First Financial Bankshares uses for interviewing potential tellers. Note the structure of the document—it not only provides the themes for the interviewer to listen for, but it also provides a rating scale for the quality of the applicant’s response. The structure of the interview guide ensures thoroughness and consistency in the interview process and also creates a tool for evaluating candidates when it comes time to make the selection.

Question: Tell me about the most rewarding part of your last job.
Response: ____________________________________________
_____________________________________________________
_____________________________________________________
_____________________________________________________

Listen for examples when they used their behaviors to:
• Get satisfaction from working with and helping customers
• Making customers happy
• Develop strong personal relationships with customers
• Receive customer compliments on their service

Figure 7.2 Sample Interview Guide (Bank Teller Position)
Reprinted with permission of First Financial Bankshares and the Bartlett Group.
Strength of Candidate’s Responses: Rating Scale:

<table>
<thead>
<tr>
<th>1 2 3 4 5 Situation Specifics</th>
<th>1 – Very Weak</th>
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</thead>
<tbody>
<tr>
<td>1 2 3 4 5 Detailed Behaviors Used</td>
<td>2 – Weak</td>
</tr>
<tr>
<td>1 2 3 4 5 Recent Example (within last 6 months)</td>
<td>3 – Neither Weak nor Strong</td>
</tr>
<tr>
<td>1 2 3 4 5 Frequency of Behavior</td>
<td>4 – Strong</td>
</tr>
<tr>
<td>1 2 3 4 5 Able to Give Reference Support</td>
<td>5 – Very Strong</td>
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</table>

Question: Give me an example of a time when you thought you were “great” at your job. What was the job and what specifically did you do that made you feel great?

Response: ________________________________________________
_________________________________________________________
_________________________________________________________
_________________________________________________________

Listen for behaviors that describe being “great” such as:
- Going the extra mile to satisfy the customers needs
- Being efficient, accurate and consistent
- Having the knowledge to solve customer issues
- Developing trust and relationships
- Being personable, friendly, outgoing with customers
- Calling customers by their name

NOTE: The actual interview guide consists of twelve questions.

Figure 7.2 (Continued)
advocates what he calls the TORC principle, which stands for Threat Of Reference Check. You want the applicant to know that you definitely plan to conduct reference checks, so he or she may as well tell you what his or her previous boss will say about his or her performance. Smart also recommends that you have the

The following questions should be asked about every position the applicant has held, beginning with his/her first job and progressing forward. These questions are designed to highlight the applicant’s focus (or lack of focus) on customer service. Added to the questions below will be the talent questions chosen from Figure 7.1. You will, of course, also need to include questions regarding specific skills required for the job.

As the applicant responds to each question below, listen carefully to the focus of the response. Does the applicant focus on the customer service aspects of the job? Are you hearing some of the same themes you heard from your current superstars?

- What were your responsibilities in this job?
- What did you find most enjoyable about the job?
- What did you find least enjoyable about the job?
- What did you learn from the job that may help you in the position you are applying for?
- Tell me about a specific story or occurrence regarding the job that you are particularly proud of.
- Who was your direct supervisor?
  - May we contact him?
  - How can we contact him?*
- What do you feel your immediate supervisor will indicate as your major strengths?
- What do you feel your immediate supervisor will indicate as possible weaknesses?

*If possible, have the applicant arrange the contact. The likelihood of speaking with the direct supervisor is increased if the applicant makes the arrangements.

Figure 7.3 Customer Service–Related Interview Questions (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
not wanting to ruin the person’s chances for the job. And, if no references call back, you’ve learned something without ever actually speaking with the references.

Figure 7.4 provides some questions to ask references. The purpose of the reference check is to ask a peer about the applicant’s performance and to check the reference’s responses against those

The following list of questions are meant to supplement current reference check questions that interviewers typically ask, such as employment dates, reason for termination, job responsibilities and skills, and quality of work. The questions are designed to uncover patterns of behavior regarding the applicant’s customer service orientation.

- What did the applicant seem to find most enjoyable about the job?
- What did the applicant seem to find least enjoyable about the job?
- What words or phrases would you use to describe the applicant’s ability to interact with customers? Explain.
- Describe how the applicant handled challenging customer situations.
- What did customers say about the applicant?
- What did you find motivated the applicant to perform at her best?
- What did you find to be the applicant’s de-motivators?
- What should I know about the best way(s) to supervise the applicant?
- What words or phrases would you use to describe the applicant’s interaction with other employees?
- Tell me about a time in which you had to coach the applicant. What was the impact on her performance?
- Would you recommend that I hire this person for the job that I’ve described to you?

NOTE: Some questions must be adjusted for those applicants in a support role, with little or no end-customer contact.

Figure 7.4 Reference Check Questions (Go to www.UnleashingExcel-lence.com to download a customizable copy of this form.)
key indicators over time; you may add to them, but to ensure consistency in the comparison of ratings you’ll need to keep the same core measurements.

Figure 8.1 is an example of a survey you can tailor to your needs. We can hear the statisticians screaming that the questions have not been statistically analyzed for your particular industry and no correlation analysis has been done. They’re right. But at least you will get some key information you need to make service decisions. And remember, that’s the point.

1. Knowledge and skill of our employees:

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Comments:

2. Availability of employees to help:

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Comments:

3. Overall courtesy of employees:

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Comments:

4. Ease of doing business with us:

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Comments:

Figure 8.1 Sample Customer Survey (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
There are three key questions in Figure 8.1. The others flesh out the information. The three key questions are:

- Overall, how satisfied are you with our product/service/company?
- How likely are you to continue doing business with us?
- How likely are you to recommend us to others?

Likelihood to return and likelihood to recommend are considered key indicators of customer loyalty. Of course, if you can measure actual repeat business, and actual customer referrals, then do that. Those are the definitive satisfaction measurements!

Tailor the survey to your operation. If a department store decides to survey customers as they leave the store, it would be important to track what departments the customer visited. You
In Chapter 1, we mentioned the research of Fredrick Reichheld, which resulted in his groundbreaking book, *The Ultimate Question: Driving Good Profits and True Growth* (Harvard Business School Press, 2006). Reichheld’s research has shown that one question can be most powerful in determining your loyal customers: How likely is it that you would recommend this
company to a friend or colleague? The metric that it produces is what Reichheld calls the Net Promoter Score (NPS), which has become an increasingly popular tool for measuring customer satisfaction. NPS is based on the premise that customers fall into three different categories: “promoters,” “passives,” and
is a problem. The hardest part of local measurement is deciding what’s important to measure and track.

Every area of the company should ask, “Who are our customers and what is important to them?” Service Maps developed by each team can be an excellent place to start. Since Service Maps shed light on how customers interact with the workgroup, it makes sense to use them as a measurement generator. What areas of opportunity did the Service Mapping process highlight?

Figure 8.4 provides some guidelines in deciding what to measure. It takes two dynamics into account: potential impact on the customer experience and the amount of control the team has over the service factor.

As you brainstorm possible measurements, plot them on the graph. The most effective measurements will be the ones that fall in the high impact, high influence quadrant. There will be disagreements over impact and influence, but that’s part of the point—open dialogue is critical to ongoing improvement. Examples of local measurements we’ve seen used include:

- Physician’s office wait schedule. Physicians’ offices are notorious for running behind schedule. Who hasn’t sat in a doctor’s office fuming because it was clear that the staff
of the charts is standardized. This allows anyone walking through any area to identify that area’s service improvement measurement charts. The information tracked will obviously vary by area, but the overall look of the charts will be the same.

There are many styles of measurement charts; the main thing is to keep it simple. Its purpose is to provide a quick visual regarding service progress. Figure 8.5 is an example of a simple measurement chart that is flexible enough to use in most circumstances. In this case it’s used to chart average wait times in a physician’s office.

The chart is roughly poster-size and is easy to read. The vertical axis can be adapted to represent a variety of measurements such as wait times, questions answered, towels delivered, service requests fulfilled, and so on. It’s up to the workgroup to determine what’s measured. The horizontal axis usually denotes units of time. Measurements (average wait times in Figure 8.5) are posted each week and tracked. The information gleaned from the charts becomes the foundation for service improvement discussions.

We recommend standardized measurement charts so that they can be branded to your company’s service improvement effort. Any time an employee sees one of these charts they should

![Figure 8.5 Process: Waiting Room Time](Go to www.Unleashing-Excellence.com to download a customizable copy of this form.)
employees can easily see how the actual wait time compares to the goal. By looking at the chart, the team can discuss what’s having the greatest impact on wait times. They can see the occasional spikes where the wait time increased above the goal. What happened that week? The measurement and goal provide the foundation for what should be a lively discussion.

When to Change Measurements

As noted earlier in the chapter, each workgroup should identify two to three service measurements that apply to their operation. When should the workgroup stop measuring a particular factor and choose another measurement? It depends upon the situation, of course, but the team should collaboratively decide to move on to other issues if:

1. The issue has been solved (i.e., the Housekeeper room-readiness issue).
2. The team is consistently achieving targeted goals (i.e., the physician’s office wait time).

One purpose of service measurement is to engage all employees in the process. If measurements become stale or lose their
measured. These same organizations find solutions to service problems that have been haunting them for years. Effective measurements serve as a scorecard on the journey to service excellence.

**Service Improvement Team Action Steps**

- Create baseline measurements using key business metrics.
- Develop a customer satisfaction survey instrument or engage a vendor to implement a survey.
- Develop measurement chart formats and procedures.

**Figure 8.7 Guidelines for Leaders in Local Measurements**
business. The same principle applies in your organization, no matter the size.

The challenge for most of us as leaders is that we’re so busy we don’t take the time to notice the good things happening around us. It’s not that we don’t want to thank employees—we just don’t always remember to do it. It’s like remembering to get the oil changed in your car. We know that we should get it changed every 3,000 to 5,000 miles, but it’s hard to remember to do it. But if you don’t, you’re headed for trouble down the road—just like failing to recognize employees for good work. Many auto repair shops now place a sticker on the car windshield to remind us when it’s time for an oil change. They’ve given us a tool to follow through on our good intentions. We recommend developing a tool to remind leaders to “catch people doing things right.” Figure 9.1 is an example of such a tool. It’s simply a card, small enough to fit in a pocket, wallet, purse, or organizer, and can be given to any employee caught providing excellent service.

There’s space on the card to write the employee’s name and what he or she did to receive recognition. The card is given to the employee on the spot. Any member of management can give any employee a recognition card (we’ll discuss peer-to-peer recognition in the next section).

Some organizations have a drop box in which the recognized employee can submit the card for a month-end drawing. Do that if you want to, but remember that the real power is the immediate

![Figure 9.1 On-the-Spot Recognition Card](Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
• teamwork
• covering a shift so an employee can get to a son/daughter event
• helping a coworker through a tough time
• solving a departmental problem

One of the reasons that this approach is powerful is that it increases the likelihood that those employees who work in support areas will be recognized for service. Usually the glory goes to customer-facing employees. We know that support areas are critical to customer service success, but we don’t always treat them that way. Recognition should flow throughout the organization. Figure 9.2 is an example of a cross departmental recognition tool you can customize to your operation.

Before moving on to company-to-employee recognition, a point needs to be made about documentation: Any form of recognition—manager-to-employee, peer-to-peer, or company-to-employee—should be documented on the employee’s record card or file. Service excellence recognition should play an important role in performance appraisals, pay increases, promotions, and job transfers, so documentation is critical. It’s pretty embarrassing to give a person a “needs development” for a service factor on a performance appraisal, only to be handed a stack of service recognition cards he’s earned during the year.

<table>
<thead>
<tr>
<th>Thanks for Your Help!</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee’s Name _______ Department ______________</td>
</tr>
<tr>
<td>Comments: ______________</td>
</tr>
</tbody>
</table>

| My Name ______________ | My Department __________ |

Your Performance Strengthens the Whole Team!

Figure 9.2 Cross-Departmental Recognition Card (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
collecting valuable student feedback that will help improve their service. Dr. Henningsen says, “We want to make our staff feel special, let them know they are appreciated, and also set them up to be role models for other staff members, thus encouraging others to help change student lives.” The program has been a huge success and has resulted in significant improvements in the college’s satisfaction metrics across all areas. In fact, the service satisfaction rates were the highest during the 10 Days of Service Excellence than at any time throughout the registration window.

Figure 9.3 provides a flowchart for a formal recognition process. It ensures that deserving employees receive the top, formal recognition. The process should be taken seriously and should be well publicized. The award ceremony should be something very special that truly acknowledges the accomplishment and creates a lasting memory. Some organizations provide a significant memento of the accomplishment for which the employee is being recognized. One company rewards the winners of their formal recognition program with a porcelain ballerina. This exquisite statuette has been established as the symbol of a dedicated individual who plans, practices, and rehearses to always

1. Nomination form completed by co-workers(s).
2. Form dropped in collection box or sent to appropriate representative.
3. Nominee’s name logged.
4. Nominee’s name sent to recognition committee.
5. Recognition committee validates criteria with assistance from department leader, co-workers, customers.
6. If criteria are met, nominee’s name continues in process. If criteria are not met, name is withdrawn, but employee receives note of congratulations for nomination.
7. Recognition committee conducts final processing and selects recipients.
8. Recipients notified of celebration date and time.
9. Celebration!

Figure 9.3  Formal Recognition Process Flow
The Role of the Service Improvement Team

If one area of the company is suffering with a service problem, it’s likely that another area has a similar issue. We were conducting a
## Service Obstacle Form

*Indicates Mandatory Fields

**Service Obstacle Details by Initiator**

<table>
<thead>
<tr>
<th>Obstacle Data</th>
<th>Information Entry Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry Date</td>
<td></td>
</tr>
<tr>
<td>Obstacle Initiator</td>
<td></td>
</tr>
<tr>
<td>Obstacle Initiator Phone Number:*</td>
<td></td>
</tr>
<tr>
<td>Department:*</td>
<td></td>
</tr>
<tr>
<td>Location:*</td>
<td></td>
</tr>
<tr>
<td>Obstacle Initiator Business Unit:*</td>
<td></td>
</tr>
<tr>
<td>SOS Leaders:</td>
<td></td>
</tr>
<tr>
<td>Region:</td>
<td></td>
</tr>
<tr>
<td>Obstacle Category:*</td>
<td></td>
</tr>
</tbody>
</table>

What is the obstacle that is preventing excellent service delivery?*

(Please include at least one example and be as specific as possible)

Please describe the impact of this obstacle on the customer experience/customer business, and/or your ability to service the customer.*

---

**Figure 10.2 Service Obstacle Form**

Reprinted with permission from Cummins.
are addressed and additional resources provided as needed. Their online obstacle tracking form is shown in Figure 10.3. Through their system, anyone can see what obstacles have been submitted, who’s responsible for the solution, and what progress has been made.

Keep in mind that you may have similar systems in place that can be adapted to include customer service issues. Such was the case with LYNX. They had a very successful process in place for their operations employees to report obstacles and it was fondly known as “Nip It In the Bud.” The Service Obstacle System subteam saw it as an opportunity to build upon the success of the current system and widen its scope to include all areas of the organization. The software had to be put in place for its expanded use, but it was felt by the subteam that keeping the name “Nip It
### Figure 10.3 Service Obstacle Tracking

Reprinted with permission from Cummins.

<table>
<thead>
<tr>
<th>Tracking #</th>
<th>Obstacle</th>
<th>Cross BU or Local Power Gen</th>
<th>Originator’s Organization</th>
<th>Date of Origin</th>
<th>Date of Reporting</th>
<th>Days Open</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Project Status (Per Project Plan)</th>
<th>Owner’s Organization</th>
<th>Process Owner</th>
<th>Closure Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
In the Bud” and allowing all employees to access the system would be a better approach than totally redesigning a new system for all. Figure 10.4 shows the template and flow of their system. The Service Obstacle System team will need to work closely with all functions of the organization to test the system and make needed adjustments. They will need to collaborate with those responsible for the Training and Awareness Leadership Actions to ensure that everyone in the organization understands how and when to use the system.

Use of the Formal Service Obstacle System

The formal Service Obstacle System is not designed to take the place of local problem solving. Leaders and frontline employees
Position: Full Serve Attendant
Responsibilities to Serve the Customers:

CORRECT—Ensure that all aspects of the customer interaction are handled and executed correctly.

1. Adhere to safety regulations.
   - Adhere to emergency response plan.
   - Adhere to all safety regulations when pumping gasoline.
   - Maintain a safe environment and handle emergencies.
   - Complete a visual check of grounds for snow and ice.
   - Keep driveways, walkways, and pump islands clear of snow and ice.
   - Clean up all spills.
   - Keep lights in good operating condition.
   - Inform manager of any lights not in good working condition or if supply of bulbs is low.

2. Ensure that all exchanges of products, services, and compensation are fair and accurate.
   - Pump the amount of gasoline requested by the customer at the full-service island.
   - Accept payment in the form of cash, credit card, debit card, and loyalty card.
   - Provide correct change, receipts, and all appropriate documents that are due to the customer.
   - Answer customer questions with correct information.
   - Provide accurate directions.
   - Recommend car care products (oil, windshield fluid) only when levels are low and in need of replenishment.
   - Complete shift end and balance cash/tender.

3. Create and present an appropriate image to customers.
   - Dress in an approved uniform, and present a well-groomed, clean, and fresh appearance at all times.

Figure 11.1 Sample Job Description
• Maintain site exterior cleanliness and orderliness.
• Keep the lot, yard, and pump islands clean and free of debris.

AVAILABLE—Ensure that products, services, and attendant assistance are available to customers when they want and need them.

1. Ensure that materials and supplies associated with all offerings are stocked and available to customers at all times.
   • Keep windshield service units stocked and well maintained.
   • Keep washrooms stocked and clean as per site housekeeping schedule.
   • Maintain displays.
   • Keep merchandise clean and stacked neatly in displays.
   • Keep pumps, signs, and glass clean.

2. Assist customers in obtaining the products and services they want and need.
   • Acknowledge each driver as they pull into the full-service island with a verbal greeting or a wave.
   • Demonstrate appropriate “hustle,” and approach each driver as quickly as possible.
   • Offer to check oil, fluid levels, and to clean windshields.

ATTENTIVE—Look for opportunities to proactively make the customers’ experience at the site smooth and hassle-free.

1. Build relationships with customers by being proactively friendly and helpful.
   • Proactively engage customer in friendly conversation.
   • Learn regular customers’ names, and address them by name when they visit.
   • Sell products that will be of benefit to the customer.
   • Advise customers of any specials or promotions that are being offered inside the store.
   • Thank every customer and invite them back.
2. Engage customers in participating in loyalty programs and offers.
   • Ask customers if they have a loyalty card. If not, explain the benefits of the card and assist them with registration.
   • Inform customers of the number of loyalty points they have accumulated, and how their points could be redeemed immediately.
   • Advise customers on the best use of loyalty points.

WOW—Exceed customer expectations by providing assistance and service that is “above and beyond” what they expect.

1. Provide special assistance to customers with special needs.
   • Offer to obtain products from inside the store for mobility-impaired customers or adults with small children.
   • Offer to obtain products from inside the store on rainy days.
   • Ask customer if they need any directions before they leave. Provide directions and map when necessary, and obtain directions that you are unsure about.
   • Advise customers if tire air pressure seems to need attention and offer assistance in filling tires.
   • Be aware of the nearest car repair facilities.

2. Interact with self-serve customers and offer assistance.
   • Greet customers at the self-serve pumps.
   • Offer “full-serve attention” to self-serve customers whenever the full-service pumps aren’t busy.

Creatively solve customer problems, whether site-related or not.

Figure 11.1 (Continued)

The descriptors developed for your Service Standards, as described in Chapter 4, can provide a starting point for job description content.

Job Descriptions for Management Positions

The best approach that we’ve seen for crafting job descriptions for leadership positions is using the popular “three-legged stool”
1. **Position the discussion**—This step lets the employee know *why* the coaching is occurring. Too often leaders will begin discussing the performance situation (Step 2) without providing context. The best way to position the discussion is to refer to the organization’s objectives, values, or standards that connect to the performance issue you are addressing.

2. **Discuss the performance situation**—Based on the perspective of Step 1, what is the current performance? What is happening (or not happening) that is causing a problem? It’s important at this step to discuss observable performance and not pass subjective judgments such as, “You have a poor attitude.” The best approach is to discuss outcomes that have been agreed upon, but not satisfactorily accomplished or an organizational performance standard that has not been met.

3. **Set a plan of action**—At this step, the employee and the coach agree on what behavior(s) must change. A rule of thumb is that the employee should do the majority of the talking, with the manager guiding the discussion. The employee must own the solution. Keep in mind that the employee will not always agree that there is a performance problem. While it is most helpful that they do agree there is a problem, it is more important that they understand you expect a change in performance and that they are clear on what that change is.

4. **Communicate the consequences of non-performance**—This step is often left out because discussing consequences can be uncomfortable for the employee and the manager. Without consequences, however, there is little incentive for the employee to change his behavior. The consequences aren’t always extreme, like termination of employment—not every situation is that bad. But consequences must be discussed. The consequence may be to the organization or to the customer experience, but there is always a consequence. The employee should clearly understand the consequences of his or her actions.

5. **Set a follow-up plan**—Pull out the calendar and schedule a follow-up discussion. This step communicates to the employee that the coaching was not just a chat—changes are expected and he will be held accountable for those changes.

---

**Figure 11.2 5-Step Coaching Process for Customer Service Issues**

(Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
satisfaction scores, employee satisfaction scores, and had the best financial results in the division (remember the three-legged stool?). The division went through a massive restructure. Our colleague fully anticipated being promoted into a new and expanded key leadership spot. She was not. The person that received the promotion was nowhere near as qualified to lead the new department. The division leader said he was doing “what was right for the business.” Our colleague wanted to know how such a

<table>
<thead>
<tr>
<th>Employee Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1: Position the discussion</td>
</tr>
<tr>
<td>Step 2: Discuss the performance situation</td>
</tr>
<tr>
<td>Step 3: Set a plan of action</td>
</tr>
<tr>
<td>Step 4: Communicate the consequences of non-performance</td>
</tr>
<tr>
<td>Step 5: Set a follow-up plan</td>
</tr>
</tbody>
</table>

Figure 11.3 Coaching Planning (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)
### Safety and Security

<table>
<thead>
<tr>
<th></th>
<th>Score</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adheres to established procedures as it pertains to locked workstations and logging off the network.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Protects privacy of customer information by always locking/securing confidential information.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Protects and maintains bank and customer confidentiality.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stays current on policies and procedures.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complies with information tech security policy guidelines and procedures to reduce risks.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completes required annual BVS compliance training.</td>
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</tbody>
</table>

### Accuracy

<table>
<thead>
<tr>
<th>Score</th>
<th>Comments</th>
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</table>

**Figure 11.4  Naugatuck Savings Bank Performance Appraisal Service Standards Section**

Note: Percentages don’t add to 100 percent; other components of the appraisal make up the difference. Reprinted with permission from Naugatuck Savings Bank.
- Is able to effectively perform assigned work in the allotted time frames and understands work procedures.

- Reviews work for completion and accuracy prior to submission.

- Listens, asks clarifying questions, and provides feedback to ensure accurate understanding of needs.

- Complies with federal and state regulations and completes forms accurately and on time.

- Works effectively with minimum supervision.

- Uses good judgement in absence of detailed instruction, appropriately obtains supervisor’s help.

<table>
<thead>
<tr>
<th>Responsiveness</th>
<th>SCORE</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answers phone promptly and pleasantly.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assumes responsibility for all work undertaken, follows up on assigned tasks.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 11.4 (Continued)
- Outputs work in quantities necessary to meet department needs.
- Offers prompt and accurate responses to requests, inquiries, questions and concerns.
- Completes work in allotted time, meets deadlines.
- Has learned the appropriate level of knowledge for time in this position to effectively perform job.
- Helps other team members when assistance is needed.
- Uses ingenuity in creating solutions for problems.

<table>
<thead>
<tr>
<th>Friendly, Personalized Service</th>
<th>SCORE</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Smiles and greets internal/external customers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Understands and responds to the needs of the customer. Strives for “WOW” level of service.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Recognizes and routinely demonstrates the importance of looking through the “lens of the customer.”</td>
<td></td>
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</tr>
</tbody>
</table>

Figure 11.4 (Continued)
- Maintains a pleasant, helpful attitude in overcoming difficulties and obstacles.
- Routinely performs the Everything Speaks Checklist.
- Modifies behavior and approach in dealing with different situations.
- Participates with staff to determine ways to continuously improve customer satisfaction and ensure department goals are met.

**Figure 11.4  (Continued)**
## Performance Objectives

Develop a minimum of 3 personal objectives for each category. Personal objectives should be linked to corporate and business unit objectives.

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Accomplishments/Feedback</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Experience</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate Objectives:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Unit Objectives:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Objectives:</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Experience</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate Objectives:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Unit Objectives:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Objectives:</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Operational/Financial Results</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate Objectives:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Unit Objectives:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Objectives:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Rating Scale: E=Exceeds Expectations; M=Meets Expectations; B=Below Expectations

**Figure 11.5** Sample Performance Objectives Section of Management Performance Appraisal (Go to www.UnleashingExcellence.com to download a customizable copy of this form.)