

Customer
Service
Turnaround

Facilitator's Guide

Service Heroes

Facilitator's Guide

Preview

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SERVICE HEROES

Overview of Program

This Facilitators Guide provides you with everything you need to conduct either a 1-hour or 2.5-hour training session for your organization. It contains activities and valuable information to help you conduct a highly interactive, participant-based session.

Customer Service Turnaround: Service Heroes is a 15-minute documentary video-based training program about how one organization achieved a major turnaround in its customer service capabilities. The inspirational lessons of this story apply to wherever the subject is providing a consistently high level of service.

Customer Service Turnaround: Service Heroes is a companion video to ***Customer Service Teamwork: It's Show Time!*** Both videos are meant to serve a range of customer service-training needs, depending on the user organization and its specific situation. Both have multiple teaching points and case study examples. Both are also highly inspirational and engaging. They are brief and designed to capture and hold the viewer's attention.

The third video in the series, ***Customer Service Agenda: Six Steps to Greatness***, is more specific. It is meant for managers and others with specific assignments relating to improving service performance on a daily basis. It illustrates six of the steps that helped team members at Baptist Health Care accomplish their service improvement goals.

Service Heroes is a look behind-the-scenes at Baptist Health Care in Pensacola, FL, which in the mid-'90's ranked near the bottom in customer satisfaction (10th percentile), according to the Press Ganey national database of over 600 hospitals. Now they are #1 and have been consistently for several years. The turnaround makes for one of the most compelling customer service stories ever told.

Besides delivering superior service, Baptist Health Care has become one of the best places to work as well. It was recently ranked #10 on Fortune Magazine's Best Workplaces list.

What's their secret? There is none, really. It's just that they take a simple, common sense approach to creating customer satisfaction. The idea is that everybody, no matter who they are or what their position, can make a difference and is expected to do so. To propel the change, employee teams created a set of Standards that now permeate the organization. Everyone knows what they are. Everyone follows them. The result: service scores quickly rocketed upward and stayed there!

Program Learning Points

Whether your participants work in a hospital, a bank, an insurance company, a retail store, a government agency, or an equipment manufacturer, in other words, no matter what your organization, *Customer Service Turnaround: Service Heroes* will get them thinking about what they can do to improve service delivery and become, in their own ways, service heroes. As your participants go through the program they will learn to go beyond the status quo to new, extraordinary levels of personal commitment and service delivery.

The program teaches by allowing your participants to observe and discuss the people and actions that fueled the turnaround at Baptist Health Care.

Your participants will come to understand that they too can:

- be ready for moments of truth.
- understand to the fullest the organization's customer service policies.
- improve not by just doing what they have always done, but achieve new levels of excellence through change.
- always think CUSTOMER!
- support fellow team members in their pursuit of customer service excellence.
- be a SERVICE HERO!
- experience work as fun and personally fulfilling.
- be consistent in their service commitment.
- use their personal attitude as a powerful tool for good and advancement.

In the broadest sense, they will see the power of a simple, clear set of Standards and how adherence to them creates an environment in which service flourishes. This, in turn, seems to encourage individuals to go the extra mile in their own service delivery. The profiles of Service Heroes like cashier Sig Jones and chef James Whaley bring it all to life. They give your meeting a set of examples with numerous discussion points and lessons that educate and inspire.

Preview

WHAT TO DO BEFORE
THE PROGRAM

Preview

REVIEWING FOR RELEVANCE

Customer Service Turnaround: Service Heroes appears, at first, to be a film about a hospital. Thus, training session participants in industries other than health care might wonder what they have in common with a hospital. "Why are we watching this?"

Your job as Facilitator is to help the audience understand that they are actually observing a story with lessons that apply in every organization. In fact, learning power often is enhanced when watching examples from outside one's industry and making the relevant translation of lessons and actions. This forces you to think outside the box and to be open to other ways of doing things.

"If they can achieve this level of service in a hospital, then so can we in our organization".

You can make the point that the turnaround itself, the achievement of going from the bottom to the top, is the real story and that its lessons are profound. There is something to learn from any group that accomplished so much in the difficult area of customer service.

Another point to make is about consistency. Once they reached the top at Baptist Health Care, they have stayed there for five years! This is a story of rock solid, long-term service success. It is meritorious and important.

As facilitator, you play an important role in helping people to expand their thinking. Try the following:

STEP ONE:

Review the video program and support materials with an eye towards relevance to your organization. Watch it at least twice. As you do, ask yourself:

- What aspects of the program might be hard to understand or accept by my participants? Much of the answer here depends on your organization and the regularity of customer contact. At the hospital, most employees encounter customers.

- How are the key points relevant to my organization?

- Here the notion of intense customer focus, empowering people to meet customer needs, having a Standards Team, encouraging people to go the extra mile, etc. all apply.

- What are examples of specific situations in our organization where the following main content points are important?

(Use the space below each point to capture your thoughts).

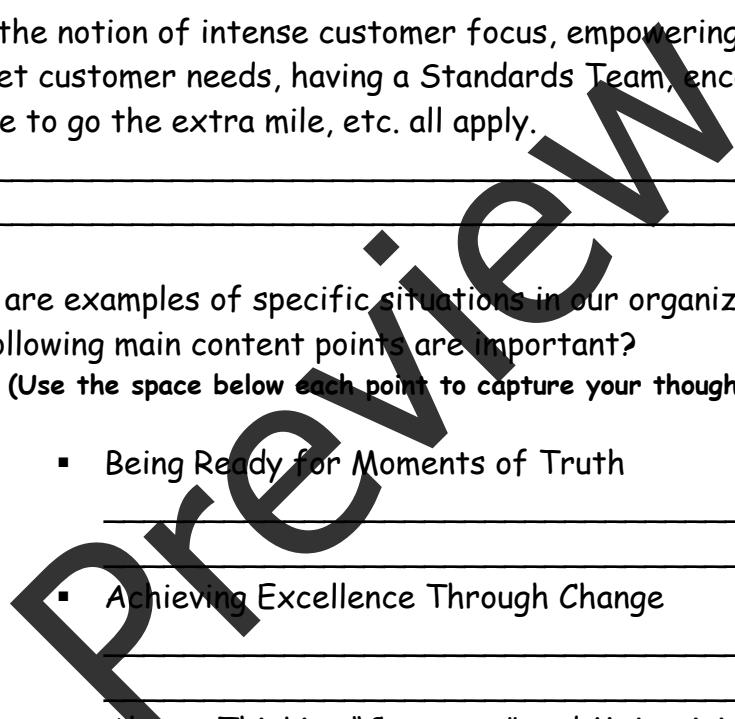
- Being Ready for Moments of Truth

- Achieving Excellence Through Change

- Always Thinking "Customer" and Maintaining a Clear Set of Service Standards

- Working as a Team to Create Customer Satisfaction

- Who Are Our Service Heroes?



- How Is Our Work Fun and Fulfilling? What are we doing to promote positive attitudes?
-
-

STEP TWO:

Determine areas within your session to discuss how the program is relevant to your environment.

Often the best way to handle the relevancy issue is to deal with it directly. We suggest this strategy when dealing with those participants having difficulty connecting the hospital environment (or other issues) to your organization. As you develop your training program, identify opportunities to reinforce the ideas from the video with specific examples or needs with which your participants are familiar. We would suggest you do this at the following times:

- In any pre-session materials that you send participants.
- In the introduction of the program and review of session objectives.
- Before and after viewing the video.
- When other opportunities present themselves.

STEP THREE:

Survey your participants throughout the session to make sure the connection is being made.

A quick survey of participants can give you an idea of whether they are making the connection between the lessons of *Service Heroes* and their own organization, department, team, etc. Every so often you might want to ask, "How does the point they showed in the film correlate with what we do?" Keep a list of the connections that people are making. These "connections" can become part of the discussion and follow-up activities.

For example, here are 5 areas where any organization should be able to make a connection to the video; they are "universal" points about service excellence:

- How they redefined "patient" to become "customer". This level of customer focus applies everywhere.
- How they involve every employee, at every level, in service delivery. This also applies everywhere. What employees in your organization do not have a customer service commitment? Would this stand at Baptist Health care?
- How they empower all employees to go the extra mile to be a service hero. This concept is viable everywhere.
- How there is no margin for a bad day. Is there any margin for a bad day in service in your organization? What would happen if everyone took a week off from customer service?
- How the people who deliver great service feel really good about it. This sense of pride and accomplishment drives progress at all service leaders.

Once you feel comfortable the connection is being made, build on it. Continually make the connection and get people thinking about what they are seeing translates to their own organization.

DEVELOPING YOUR AGENDA

Before developing the agenda for *Customer Service Turnaround: Service Heroes*, take a moment to step back and look at the big picture. Ask yourself the following questions to assist in developing the approach to your session. Use the space below each question to capture your thoughts.

1. What level/types of participants will be attending my session?

2. How many will be participating? _____

3. What are the top three points I want to make in this session? What are the three supplemental points I want to make? What are the parts of the video to which I will refer to help make these points?

Top 3 Points	Supplemental Points
A.	A.
B.	B.
C.	C.

4. What kind of customer service training has this group gone through in the past? Is there anything that should be reviewed and built upon?

5. What resistance do I think the audience might have about the subject or materials I am using?

6. What will the participants want to get out of the session?

7. What would their managers like to see come from the program?

8. How can I help them implement what they learn in their work environments?

SAMPLE SESSION AGENDAS

Feel free to email Sam Tyler, the series producer, at tylersam@cox.net for any insights he might have to help in agenda development.

We've provided suggested agendas for either a 1 or 2.5-hour session. But remember, they are just a guide; we encourage you to use them as a reference in developing your own customized agenda.

Take into consideration the specific needs of your audience and your ultimate goals for transfer of learning and implementation when creating your agenda materials.

Suggested Agenda-1 Hour

- 5 minutes Introduction and Objectives
- 5 minutes Discussion on *Achieving Consistently Great Customer Service: The Turnaround and The Creation of Service Heroes*
- 20 minutes Introduce and Show Video-*Service Heroes!*
- 5 minutes Video Debrief
- 15 minutes Review of Three People Factor Points
- 10 minutes Personal Action Plan

Suggested Agenda-2.5 Hours

- 5 minutes Introduction and Objectives
- 15 minutes Icebreaker
- 10 minutes Discussion on *Achieving Consistently Great Customer Service: The Turnaround and The Creation of Service Heroes*
- 30 minutes Introduce and Show Video-*Service Heroes!* and Video Debrief
- 5 minutes Moments of Truth Discussion
- 10 minutes Break
- 5 minutes Review of People Factor Issues
- 15 minutes People Factor 1-Achieve through Change
- 15 minutes People Factor 2-Always Think Customer
- 15 minutes People Factor 3-Find a Way-Make a Difference
- 10 minutes Concluding Activity
- 5 minutes Session Review
- 5 minutes Personal Action Plan
- 5 minutes Conclusion, Evaluation, and Call to Action

BLANK SESSION OUTLINE

Following is a blank session outline. Feel free to pick and choose different activities from the learning points and suggested agendas contained in this guide. You should incorporate your own activities as well. Remember, the more you can tie your session to the specific needs of your participants, the more successful you will be.

Activity	Time	Page/Location of Materials
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

TRAINING SESSION CHECKLIST

As your session nears, you will want to make sure you have the materials, equipment and other resources needed to make things go smoothly. Use the following list to check your progress.

2-4 weeks before the session

- ❑ Preview the video and read the Facilitator's Guide to become familiar with the program.
- ❑ Set your agenda and determine the session length.
- ❑ Determine the date and location for the session. Verify the room is accessible and equipped for participants with disabilities.
- ❑ Invite participants.

1 week before the session

- ❑ Finalize the agenda.
- ❑ Verify which participants will be attending.

1-2 days before the session

- ❑ Review the video and Facilitator's Guide at least twice to thoroughly prepare for the session. Become familiar with all discussion points and activities.
- ❑ Review your goals and desired outcomes for the participants.
- ❑ Gather all materials.
- ❑ Make copies of the participant materials in the back of this guide for each participant.
- ❑ Arrange for food and/or beverages (optional).

1-2 hours before the session

- Review agenda, discussion questions and activities using Facilitator's Guide.
- Verify you have all materials and equipment.
- Arrange the room with U-shaped seating or small group seating. Ensure all seats have a good view of the screen.
- Check that VCR and monitor are working properly. Make sure you know how to control volume, tracking and color.
- Check that the videotape is rewind.
- Check that the overhead projector/LCD Projector is working properly.
- Place pens or pencils and notepads at each seat (optional).
- Set up food and/or beverages (optional).

Session Materials and Equipment

- Videocassette *Customer Service Turnaround: Service Heroes*
- Facilitator's Guide
- Session Evaluation Forms (1 for each participant)
- Overheads/PowerPoint Presentation
- Video player and monitor(s) or video projector and screen
- Overhead Projector/LCD Projector
- Flipchart and Markers
- Masking tape to post flip charts (not necessary if using self-sticking flip charts)
- Pens or pencils and notepads (optional)
- Other _____

PRE-SESSION COMMUNICATION

If your organization and participants are like most, you'll find yourself competing for time and attention with many other daily activities and issues. To help get the most from your session, we suggest communicating with your participants prior to your session to help them understand goals and process. You should get them to begin thinking about issues they may wish to learn about or discuss. You may even want to have them do some pre-work to help get them in the right mindset. We've designed the following dialogue that you can send to participants 5-7 days prior to your session in either email or memo form. Feel free to modify to meet your specific needs.

Greetings!

I'm looking forward to our time together in the upcoming session on customer service. I know you're busy and I appreciate the time you've committed to attend. We all know that service is a daunting issue, and it's a vital one as well. More and more, it's customer service that differentiates organizations. We want to be considered among the best!

Rest assured that I will be doing everything I can to make the meeting informative, enjoyable, and worthwhile. I've developed a lively and exciting agenda to help us all work toward the goal of consistent excellence in customer service.

*Our session isn't going to be a typical meeting. We will be utilizing a short, high energy, fun-to-watch documentary video called **Customer Service Turnaround: Service Heroes** that will take us inside Baptist Health Care in Pensacola, FL. This is the hospital that was in the news in July 2001 after a boy was attacked by a shark at a nearby beach.*

You may be saying, "What can I learn from a hospital? We're not in the health care business?"

Consider their achievements: They are #10 on Fortune Magazine's list of Best Workplaces; they are #1 in a national customer satisfaction database

of over 600 hospitals; and their employee satisfaction is consistently high as well. There is much to learn by their example, particularly from the story of how they turned around their customer service program to make it best in class.

During the session we're going to spend time talking about:

- *How they redefined "patient" to become "customer". This level of customer focus applies everywhere.*
- *How they involve every employee, at every level, in service delivery. This also applies everywhere, as well. What employees in your area do not have a customer service commitment? Would this stand at Baptist Health Care?*
- *How they empower all employees to go the extra mile to be a service hero. This concept is viable everywhere.*
- *How there is no margin for a bad day. Is there any margin for a bad day in service here? What would happen if everyone took a week off from customer service?*
- *How the people who deliver great service feel really good about it. This sense of pride and accomplishment drives progress at all service leaders.*

Make sure to note the following information:

Session: *Customer Service Turnaround: Service Heroes*

Date: *(Insert Date)*

Time: *(Insert Time)*

Location: *(Insert Location)*

We're planning a highly interactive and participative session. Come prepared to open your mind and your mouth! We want you to explore new ideas as well as to share the great things you are doing already.

A topic you might want to think about prior to the meeting is how you would answer the following questions:

If we were to change something in our customer service delivery, what would it be? How hard would it be to change?

What are some of the first steps required? What is the basis of all good customer service?

We'll be discussing these and similar points in our session.

If you have any questions prior to our time together don't hesitate to contact me at (insert preferred contact information). I look forward to seeing you!

Preview



CONDUCTING
THE
SESSION

Preview



MATERIALS CHECKLIST

If you've taken the appropriate time and actions to prepare for your session, you are well on your way to success. As you make final arrangements, you may wish to use the following list to make sure you have the materials required for your session to go smoothly:

- Appropriate Space and Seating Arrangements
- Refreshments for Break
- Flip Chart and Stand
- Flip Chart Markers
- Masking Tape
- Computer/PowerPoint File
- Video Projector with VCR Connection (or TV/VCR Unit)
- Strong, clear audio capability
- Video-"*Customer Service Turnaround: Service Heroes*"
- Copies of Handouts for Participants
- Extra Pens and Pencils for Participants
- Copy of "*Next Monday Morning*" for each participant (optional)

INTRODUCING THE SESSION

Estimated Time: 5 Minutes

Materials Needed: PowerPoint Slides #1, #2, and #3

Purpose: Introduce the goals and objectives of the session to participants and create an environment conducive to learning and sharing.

- Show PowerPoint Slide #1-Title Slide

- **Say:**

"Welcome to our customer service training session entitled Service Heroes. Our three main goals today are (Add in your specific session goals.)

1. _____
2. _____
3. _____

In today's session we're going to work toward these goals by exploring what it takes to become a Service Hero! Service Heroes is also the name of the video we will be using as the basis of our program.

This is a documentary film about customer service in a hospital, Baptist Health Care in Pensacola, Florida. What you will see is how excellent service is delivered consistently, day in and day out.

What makes this program so interesting is that just a few years ago Baptist Health Care, was near the bottom in customer satisfaction ratings. Their performance was dismal; they ranked in the 10th percentile.

The video is the story of their remarkable turnaround. It contains some insights on how they achieved the #1 ranking a few years ago and have held it ever since.

My hope is that by watching the program, we can look at ways we can change and continue to improve our own service. That is not to say that we are awful in service, it is just that in order to fulfill our mission, to grow, and to compete, we need to keep looking for ways to improve. Every organization does.

The reality is that what we do today that is special for customers becomes tomorrow's ordinary expectation, so we need to continually look for ways to improve.

As we review the film and discuss it afterwards, we will talk about what they call the People Factor. Simply put, the People Factor means that everybody can make a difference everyday in the lives of our customers.

We will also talk about teamwork and how everyone can work together to not just meet, but exceed the needs of our customers.

And finally, but maybe most importantly, we will talk about what we all get from providing great service and how are we fulfilled."

- **Show PowerPoint Slide #2 and #3-Session Objectives**
- Using PowerPoint Slide #2 and #3, share the following information with participants:

"Specifically, in our session today, we plan to discuss how we can:

- be ready for moments of truth.
- understand to the fullest the organization's customer service policies.
- improve not by just doing what we have always done, but achieve new levels of excellence through change.
- always think CUSTOMER!
- support fellow team members in their pursuit of customer service excellence.
- be a SERVICE HERO!
- experience work as fun and personally fulfilling.
- be consistent in our service commitment.
- use our personal attitude as a powerful tool for good and advancement."

Transition to Introductions

INTRODUCTIONS

Estimated Time: 10-15 minutes depending on the size of your group (Approximately 1 minute per person. If you have a large group, you may want to introduce by teams or departments)

Materials Needed: Flip Chart, Flip Chart Markers, and PowerPoint Slide #4

Purpose: To introduce your qualifications as facilitator and have participants begin to familiarize themselves with each other. Additionally, through information sharing you will begin to create a list of what it takes to offer exceptional customer service.

-
- **Show PowerPoint Slide #4-Introductions**
 - Introduce yourself as the trainer/facilitator and any relevant background you have in relation to the subject matter.
 - Ask that each participant share a little about themselves by sharing the following:

Name

Department

Customer Service Role

Additionally, ask each person to share what he or she thinks it takes to offer exceptional customer service...not the ordinary, but the extraordinary. What changes do we need to make to achieve this?

Answers may include things such as, "Someone who doesn't just give me what I want, but what I need." Another answer could be, "Someone who goes out of their way to do something extra." Or another could be, "Someone who is proactive and comes to me with a suggestion for what I might need."

If they have a problem coming up with ideas you might just want to have them share an example of a time or place where they have received outstanding customer service. By reviewing the situation you will be able to help them form an idea of what extraordinary service takes. As each person shares what they expect and any necessary changes, capture those thoughts by listing them on a flip chart page.

- After everyone has had an opportunity to share information, including what they think it takes to deliver extraordinary customer service, review the list of items you captured on the flip chart.

- **Conclude by saying:**

"Was it easy to come up with ideas around extraordinary customer service? (Allow Answers) In some cases it wasn't. It's easier to come up with thoughts about ordinary customer service, but harder to figure out what constitutes truly extraordinary service.

It's the same when providing service. It's easy to offer the ordinary, much harder to provide something special. To offer something special you have to work at it, you have to think hard and be personally committed, just as you were when sharing your thoughts just a few minutes ago. But when you do get really involved, and you make a difference, it's all worth it.

Think about it. If you were to do these things (refer to list you created on flip chart) on a consistent basis with your customers, what would it mean to them? (Allow answers) What would it mean to you? (Allow answers)

People who do these things 365 days a year are what we call Service Heroes."

Transition to Barriers to Customer Service Excellence

BARRIERS TO CUSTOMER SERVICE EXCELLENCE

Estimated Time: 10 minutes

Materials Needed: Blank Flip Chart Pages and Markers for Each Small Group,

Purpose: This activity helps individuals to identify barriers (some real, some imagined) to providing excellent customer service.

- Start by dividing your participants into groups of 3-5.
- **Say:**
"Most of us want to exceed expectations. Who wouldn't want to be considered a Service Hero? But sometimes we feel that there are barriers to doing it. Some of these barriers are real, while others are imagined or self-imposed. Some are personal. Some may be organizational. What I'd like to do now is take a closer look at the list we created during introductions and determine if there are any barriers, real or imagined, keeping us from improving our own levels of customer service."
- Assign each group one of the examples of excellent customer service. Ask them to identify any barriers that might stop them from doing it in their own jobs. Ask them to determine if the barrier they identify is real or imagined. Finally ask them to determine how they could possibly break down the barrier. Have them list their thoughts on a flip chart page that they can post when sharing their ideas with the rest of the group. Give them 5 minutes to discuss.
- After 5 minutes have each group share their discussion, any barriers, and how to break down the barriers.

- **Conclude by saying:**

"Truly great customer service isn't provided by an organization; it's provided by those within the organization, people like you and me.

Service Heroes don't stop with the ordinary. They challenge the status quo and look for ways to do something extraordinary. It's not easy, it takes work, focus and persistence, and it doesn't happen overnight. But it is worth it. When you see the faces of your customers and team members lighting up, you know you've made a difference in their lives by being a service hero!"

Transition to Showing of the Video-Service Heroes

Preview

VIDEO-CUSTOMER SERVICE TURNAROUND: SERVICE HEROES

Estimated Time: 30 Minutes (Video 15 minutes/Introduction and Discussion 15 minutes)

Materials Needed: Video- *Customer Service Turnaround: Service Heroes*, Video Playback Equipment

Purpose: Allow participants to view the documentary video *Service Heroes* and capture key learning points.

- **Introduce the video by saying the following:**
"We're about to watch the video, Service Heroes. It's about one of the greatest customer service turnaround stories of all time. Watch for what they call, 'The People Factor.' The key point is that every employee at every level is involved in delivering the best possible service. They've figured out how to get everyone involved and working toward a single goal: how to deliver consistently excellent customer service.

As you watch the video, look at what they've accomplished, and how they did it. Watch for how they changed the concept of whom they serve from 'patient' to the higher expectation, more-demanding definition of 'customer.' Be prepared to discuss how we can use some of these same ideas in our organization."

- **Show Video - 15 minutes**
- Debrief the video by asking the following questions and stimulating discussion:
 1. *What are some of the main strategies Baptist Health Care used to implement the turnaround and achieve the #1 ranking?*
 2. *What kind of barriers did they have to break down to allow people to flourish?*

3. *Why was a simple idea like changing "patient" to "customer" so important? Can that be done in our organization?*
4. *What do the employees of Baptist Health Care get back as a personal reward from such an intense focus on customers?*

Transition to Moments of Truth

Preview

MOMENTS OF TRUTH

Estimated Time: 5 Minutes

Materials Needed: PowerPoint Slide #5

Purpose: Introduce this discussion by reminding participants about the news story at the beginning of the video about the shark attack. This situation was a moment of truth for Baptist Health Care.

-
- Show PowerPoint Slide #5

- Say:

"We all know that Moments of Truth will occur. They are random and unscheduled. They test everything we stand for, everything for which we have trained and prepared. Rarely are they even close to the dimension of the shark attack that we saw in the video.

Usually, in fact, they are relatively minor situations, but they have big implications for the customer. (Answering a question thoroughly, being calm and polite when the customer is irate, accepting a return, etc.). How we respond to the Moments of Truth we encounter can make the difference between a happy customer and a situation where problems develop.

You have to be ready for your Moments of Truth to happen and be ready to follow through and provide the service that will set you apart."

- Ask participants:

- *What are some Moments of Truth that you've encountered in our organization?*
- *Were you prepared? What did you do to prepare? What should you have done?*

- *What are some potential moments of truth in our organization?*
- *What are some things we should be doing now to prepare for these potential Moments of Truth?*
- **Conclude this discussion by saying:**
"Moments of Truth depend on people, not an organization. We have to prepare ourselves for the opportunities that present themselves, and most importantly have the knowledge and the focus to follow through and resolve the situation."

Transition to Review of the People Factor

Preview

THE PEOPLE FACTOR

Estimated Time: 5-10 Minutes

Materials Needed: PowerPoint Slide #6

Purpose: Review the three elements that comprise *The People Factor* as introduced in the video.

- **Begin by saying:**

"In the video they introduced what they called 'The People Factor.' They mentioned that the common driver of the customer service turnaround at Baptist Health Care was ordinary people, employees just like us, who decided to transform their culture into one dedicated to providing consistently excellent customer service. Then, as teams and as individuals, they created an environment where everyone was considered a 'customer,' rather than a 'patient.'

The difference is significant. 'Patients' can expect professional medical care, but not necessarily any of the pleasing service initiatives one might find at a Disney hotel, for example. 'Customers,' on the other hand, can expect the entire organization to be considerate of their needs and be proactive in meeting them.

What may seem only a subtle use of words was, in reality, the key to achieving the #1 ranking in the Press Ganey national customer satisfaction database."

- **Ask participants:**

"The video presented three different components of the People Factor. Can you remember what they were and what they each meant?" (Allow Responses)

- Share information from **PowerPoint #6** to make sure you have covered the three components.

People Factor #1-Achieve through Change

People Factor #2-Always Think Customer

People Factor #3-Find a Way-Make a Difference

Facilitator Note:

If conducting a 1-hour session you may wish to discuss with participants how each of the components can help in their specific customer service environment.

If conducting a 2.5-hour session you will want to forego any significant discussion on each component because you will be discussing them in more detail throughout the remainder of the session.

Transition to People Factor #1 - Achieve Through Change

PREVIEW

PEOPLE FACTOR #1 - "ACHIEVE THROUGH CHANGE"

Estimated Time: 15 minutes

Materials Needed: PowerPoint Slide #7, Flip Chart page and marker for each small group.

Purpose: To explore The People Factor: "Achieving through Change" as one of the keys to the customer service turnaround at Baptist Health Care.

- Show PowerPoint Slide #7 - Achieve through Change
- Ask participants:
 - *What were some of the changes that they made at Baptist Health Care to begin their transformation that could work in our organization as well.* Possible answers include:
 - A change in the status quo. They refused to accept the 10th percentile ranking and committed the organization to a service transformation.
 - A greater emphasis on positive attitude and respect for each other.
 - Started looking at patients as customers.
 - Realized that serving customers is an opportunity, not something that should be minimized.
 - Involved everyone, including valet parkers and maintenance personnel, in service delivery.
 - Communicated that change was positive and would have a desirable outcome for everyone.
 - *What were some things they did to sustain the change?"* Possible answers include:
 - Sharing recognition with everyone in the organization.
 - Creating a climate where it is okay to do things differently if they benefit the customer.
 - Empowered employees to become Service Heroes. People like cashier Sig Jones and chef James Whaley are

- examples of how employees "personalized" their commitment to provide exceptional service.
- Created a set of Standards, which were committed to by every employee.
 - Conduct daily "line-ups" for every shift of every department to communicate news, short-term goals, and to continually strengthen the service commitment.
- **Say:**
"Sometimes we get so caught up in our daily activities that we don't take an opportunity to step back and look at the big picture. That's what happened at Baptist Health Care while they languished at the 10th percentile. Medical care was adequate and that was their business. So, in a sense, things were OK. But, when leaders stepped back and looked at the big picture, they realized that it was time for significant change. Let's take a moment and look at our big picture. Let's try evaluating what we are doing and looking for opportunities to improve."
 - Divide participants into groups of 3-5 people. Tell each group that they have 7-8 minutes to step back and find something they would suggest changing that would result in a greater emphasis being placed on customer service. Once they've identified the activity, they should come up with 3-5 specific actions they could take to make it happen. Tell them to be prepared to share with the entire group. Their targets can range from personal attributes such as attitude or knowledge of service policies to broader areas such as recruitment of service friendly employees or career advancement pegged to service improvement goals.
 - After 7-8 minutes, have them share their thoughts with the entire group. You should capture their thoughts on a flip chart page.

Facilitator Note:

You may wish to have the flipcharts transcribed into an electronic file that could be sent to participants after your session as a reinforcement of the training session. Also note the separate file "NEXT MONDAY MORNING" for a year's worth of implementation steps, many of which can apply to your organization.

- **Conclude by saying:**

"The Power of the People Factor starts with 'Achieving through Change.' As someone once said, "If you continue to do what you've always done, you'll continue to get what you've always gotten!" If we want to make a difference, if we want to improve, we start by 'Achieving through Change.' Look at where we can do better and begin to change the way we operate until we get better."

Transition to People Factor #2-Always Think Customer

Preview

PEOPLE FACTOR #2-“ALWAYS THINK CUSTOMER”

Estimated Time: 15 Minutes

Materials Needed: PowerPoint Slide #8. Blank Flip Chart pages and Flip Chart markers for small group.

Purpose: To explore The People Factor: “Always Think Customer” as one of the keys to the customer service turnaround at Baptist Health Care.

-
- Show PowerPoint Slide #8
 - Ask participants:
 - Why did they think it was important to start to look at patients as customers?
 - What did they begin to do differently after beginning to look at patients as customers?
 - Can you remember a couple of the examples they shared about how they did things differently after beginning to look at patients as customers? Possible answers include:
 - Being late to a meeting because they were showing a customer where to go.
 - Cooking a special meal for a customer.
 - Making sure customers have phone access and food if arriving at the hospital.
 - Taking time to talk with customers when they were having a bad day.
 - Continue by stating and asking:

"In the case of Baptist Health Care they were looking at patients in the traditional way. Take them in, care for them, heal them, and send them home. The breakthrough occurred, and the rise to #1 began, when they realized that they could do much more. So in addition to 'routine' care, they committed to the concept of providing service. This means knowing people's names, asking, 'Is there anything more I can do for you?', offering to do laundry, etc.

The same can apply here. Let's make a list. What is our equivalent 'redefinition?' Where can we offer more service, whom can we serve better, what are our greatest opportunities to look for new ways of delivering service, why is this mindset so important to us?" (Allow Answers)

- **Continue by Saying:**

*"Once Baptist Health Care changed their perspective on patients to customers they began to do things differently. We can do the same thing. **Refer to the list you just created.** What might we begin to do differently?"(Allow Answers)*

- Divide participants into groups of 3-5 people. Give each of the groups one of the points identified as an area for "redefinition" of how and whom we serve. Have them spend 3-4 minutes on how they might begin to operate differently to improve service performance. Have them prepare to share their thoughts with the rest of the participants.
- After 3-4 minutes have each group share their list of actions with the entire group.
- **Conclude by saying:**
"It all begins with the important action of truly looking at someone or a group as your customer. Once you've identified them as a customer you can begin to look at what their expectations are and how you can not only meet those expectations but exceed them. It's easy to fall into the trap of the routine. Look at the list again and keep thinking about how we can break out and redefine our service delivery, just as they did at BHC."

Transition to People Factor #3-Find a Way-Make a Difference

PEOPLE FACTOR #3-“FIND A WAY-MAKE A DIFFERENCE”

Estimated Time: 15 minutes

Materials Needed: PowerPoint Slides #9 and #10, Flip Chart

Purpose: To explore The People Factor: “Find a Way-Make A Difference” as one of the keys to the customer service turnaround at Baptist Health Care.

- **Show PowerPoint #9**
- Discuss with participants the example of making a difference in the video where chef James Whaley went above and beyond to assist the elderly Asian patient. You may wish to ask:
 - Why did he go above and beyond?
 - How do you think it made the customer feel?
 - What message did his action communicate to his peers, his manager, his customers, and the organization as a whole?
- The cashier Sig Jones is another example of the personal commitment to service. Magnify that commitment by every employee, and you have a #1 organization. That's what we want to aim for here, in every team and every department.
- Ask participants to think of an example of when they or someone in their department went the extra mile to serve the needs of one of their customers.
- Have participants partner with someone else to share their stories. To aid in the sharing of their experiences **Show PowerPoint Slide #10.**
 - What was the situation?
 - Why did you choose to go above and beyond?
 - What did you do that was out of the ordinary?
 - How did the customer react?
 - How did others not directly involved with the situation, like your manager or peers, support you in the effort?

Facilitators Note

Depending on time issues, you may wish to have the pairs share one of their examples with the entire group.

- **Conclude by saying:**

"This aspect of The People Factor 'Find a Way-Make a Difference' is probably the best example of where it really is just a basic human act of kindness that makes a difference for the customer. While an organization can promote the idea of going above and beyond, it can't make it happen without individuals like us. If we choose to, we can make a difference, each and every one of us."

Transition to Becoming a Service Hero

Preview

BECOMING A SERVICE HERO

Estimated Time: 10 minutes

Materials Needed: Becoming a Service Hero Handout for each participant.

Purpose: Allow participants an opportunity to think about how they can become a Service Hero.

- **Begin by saying:**
"As we mentioned earlier, sometimes we get so caught up in our daily activities that we don't take time to just think about the possibilities. One of the great opportunities that we can all take advantage of is the chance to become a service hero. I'd like everyone to take a few moments to think about this right now."
- Give each participant the Becoming a Service Hero handout. Explain to them that you are going to give them an opportunity to envision what they could do with one of their customers to become a service hero. Have them read the instructions and complete the handout. Allow 7 - 8 minutes for completion.
- **Conclude by saying:**
"It all begins with you. You've had an opportunity to think about what it would take to become a service hero. Now it's up to you to follow through and make it happen. You'll need support from others along the way. At the bottom of your handout, write down two or three individuals with whom you can share your vision. Are there ways for you to work together? Is this for a team?"

Transition to Session Review

SESSION REVIEW

Estimated Time: 5 minutes

Materials Needed: PowerPoint Slide #11

Purpose: Review key points from the session.

- Review the following key points from the session utilizing **PowerPoint Slide #11**. Add personal comments where appropriate.
- Session Review
 - We must be ready to seize the opportunity when Moments of Truth present themselves.
 - It's the People Factor that makes a difference.
 - We need to always think CUSTOMER, no matter who they are.
 - We can make a difference with our customers. We just have to find a way.
 - We can all be service heroes.

Transition to Participant Action Plan

PARTICIPANT ACTION PLAN

Estimated Time: 5 Minutes

Materials Need: Participant Action Plan for each participant to fill out.

Purpose: Allow participants time to develop personal strategies for implementing thoughts and ideas from the session.

- **Say:**
"While it's been great to spend time with you today and we've had some very good discussion, the most important thing is what we do in the future. It's now up to you to take the things we talked about and implement them."
- Hand out a copy of the participant action plan and tell participants they have five minutes to write down several things they think they can go out and implement immediately. Be sure to emphasize the importance of implementation as key to maximizing the time they have spent in the training session.
- After five minutes, thank them for their time in planning how they can use the information from the session.

Transition to Conclusion, Evaluation, and Call to Action

CONCLUSION, EVALUATION, AND CALL TO ACTION

Estimated Time: 5 minutes

Materials Needed: Evaluation Form

Purpose: Allow participants to provide feedback on the usefulness of the training session and identify one significant action for implementation.

- Hand out a copy of the Session Evaluation form to each participant.
- **Say:**
"Again, it's been a pleasure to work with you. I hope you feel the time you have spent today has been worthwhile. Please take a moment to share your thoughts on this session, what worked well for you, as well as, what could be improved. (Allow Participants 3-5 minutes to complete the Session Evaluation)"
- *To conclude your session you may wish to conduct the following discussion concerning the "math of attitude."*

Explain that A is the first letter of the alphabet and could therefore be given the numeral 1. B would be 2 and C would be three and so on...

Place the letters A-T-T-I-T-U-D-E on a flip chart page and have participants determine the value of each letter based on the scale developed. The result should be:

A = 1 T = 20 T = 20 I = 9 T = 20 U = 21
D = 4 E = 5

If you add the numbers the total = 100

- **Conclude by saying:**
"ATTITUDE EQUALS 100% OF THE BASIS OF GREAT SERVICE. And the great thing is that you have control over your attitude, which means we all have the ability to control how we deal with customers."
- Thank participants for attending and remind them to contact you if they have any additional questions.

Preview

WHAT TO DO AFTER
THE SESSION

Preview

FOLLOW UP COMMUNICATION

An integral piece in maximizing the impact of your training session is the activities that you undertake after the session to keep your message alive. The following is information you may wish to use in communicating with participants and their managers in order to reinforce key learning points. Feel free to modify it and use it to develop a follow-up email or memorandums.

Preview

Participant Communication

"Hello. I just wanted to again pass along my thanks for your participation in our customer service training session, Service Heroes. I hope you were motivated like I was by seeing the story of how Baptist Health Care made their dramatic customer service transformation. Our efforts to improve continually in this vital area can also be a fun and exciting journey.

As a reminder, some of the points we discussed were:

- *We must be ready to seize the opportunity when **Moments of Truth** present themselves.*
- *It's the **People Factor** that makes a difference.*
- *We need to always think **CUSTOMER**, no matter who they are.*
- *We can make a **difference** with our customers. We just have to find a way.*
- *We can all be **service heroes**.*

I encourage you to use the Participant Action Plan that you received in the session as a working tool. As we highlighted throughout the session, it's the People Factor, each and every one of us, that makes the difference.

If I can be of further assistance, just let me know. If you are interested, I've developed a list of additional resources for reading on the subject. Please contact me if you would like a copy.

Remember, when it comes to great customer service, we can't just do it some of the time; we have to do it all the time. If we do that, we will all become Service Heroes."

Manager Communication

"Greetings, thanks for making it possible for your employee (insert name) to participate in our customer service training session, Service Heroes. As his or her manager you play an integral role in helping to make sure the information we discussed in the session is transferred to his or her daily activities.

For your reference, some of the topics we discussed were:

- *We must be ready to seize the opportunity when **Moments of Truth** present themselves.*
- *It's the **People Factor** that makes a difference.*
- *We need to always think **CUSTOMER**, no matter who they are.*
- *Customer service is a key **competitive weapon**. We must be committed to improve continually in this vital area.*
- *We can make a **difference** with our customers. We just have to find a way.*
- *We can all be **service heroes**.*

Several ways to reinforce the messages from our session are:

1. *Talk with your employees about the session. What did they like? What ideas did they come away with?*
2. *Have your employees share the action plan they were given at the end of the session. Talk about how you can help them follow through on the activities they identified.*
3. *Schedule follow up meetings over a period of time to check on progress. Maybe borrow the video and show it to your group again.*
4. *Continually encourage your employee to look for ways to provide extraordinary customer service and become a service hero.*

Again, thanks for the opportunity to work with (insert name). Don't hesitate to call me with questions, comments, or concerns."

"NEXT MONDAY MORNING"

Included in a separate file on the CD that was included with the *Service Heroes* video is a file titled "Next Monday Morning." This file contains 52 things you can do after your session to help participants stay focused on creating a climate where customer service excellence is the norm.

The materials can be used several ways including:

- A. Print and copy as a handout to be give to each participant at the end of your session.
- B. Divided and emailed on a weekly or monthly basis as a reminder of what was covered in your session.
- C. Printed and laminated for posting in strategic locations.

BAPTIST HEALTH CARE STANDARDS

Also included on the CD you received is a file titled "Baptist Health Care Standards." These are the Standards developed by employees at Baptist Health Care.

Feel free to use these Standards to continue your organization's journey to customer service excellence.

ADDITIONAL RESOURCES

Following is a list of additional resources you may wish to review on the subject of Customer Service.

- **Customer Satisfaction Is Worthless, Customer Loyalty Is Priceless: How to Make Customers Love You, Keep Them Coming Back and Tell Everyone They Know**
by Jeffrey Gitomer
- **Customers for Life : How to Turn That One-Time Buyer into a Lifetime Customer**
by Carl Sewell, Paul B. Brown, Tom Peters
- **Positively Outrageous Service**
by T. Scott Gross
- **Raving Fans: A Revolutionary Approach to Customer Service**
by Kenneth H. Blanchard, Harvey Mackay, Sheldon Bowles
- **Up Your Service**
by Ron Kaufman
- **Hey, I'm the Customer: Front Line Tips for Providing Superior Customer Service**
by Ron Willingham
- **Delivering Knock Your Socks Off Service**
by Kristin Anderson, Ron Zemke
- **Best Practices in Customer Service**
by Ron Zemke (Editor), John A. Woods
- **The Nordstrom Way: The Inside Story of America's #1 Customer Service Company**
by Robert Spector, Patrick D. McCarthy (Contributor)
- **Customer Love**
By Chip R. Bell

Preview
**PARTICIPANT
MATERIALS**

PARTICIPANT HANDOUTS

We suggest that you utilize the Handouts feature within PowerPoint to develop handouts for your session. After modifying the PowerPoint presentation to fit your specific needs and timeframe you can create handouts by doing the following:

1. Click on File.
2. Click on Print.
3. At the bottom, there is a section "Print What." Select "Handout" in the drop down box.
4. Next to the "Print What" is the "Handout" section, choose "3 Slides Per Page" to allow room for participant notes.
5. Click on OK
6. Make copies for each participant.

We have provided additional handouts for your use in this section including:

- Becoming a Service Hero - Handout
- Participant Action Plan
- Session Evaluation

Preview

Becoming a Service Hero

Instructions: Read the questions below and write your thoughts in the space provided.

One of my customers that I would like to become a service hero for is:

Why do I want to become a service hero to this customer? What's in it for me?

To become a service hero for this customer I would need to do the following things:

- 1.
- 2.
- 3.
- 4.
- 5.

To make the above things happen, I will need the support of:

My first step in making this happen is and will be done by:

Step:

Timeline:

Participant Action Plan

Name:

Department/Division:

Date:

1. What are some situations that you encounter with your customers that might fall into the category of Moments of Truth?
2. What are two things that could be done differently to make your customers feel like they are very important to you?
3. Who can you enlist the support of in your quest to provide great customer service? Who are they and what can they do to assist you?
4. Are there people outside your immediate area who are part of your service delivery? How do you communicate with them about your service improvement goals?
Person 1-

Person 2-
5. How important is personal attitude in service delivery? How do you think your attitude rates? Is this an area that should have attention?

6. Are you fully committed to follow through? Do you stay with the customer until the situation is resolved?

7. Is your mind and your presence 100% focused on customers when you are with them? Are you truly "there" for them?

8. What are two things that you can do to help yourself and others remember that offering extraordinary customer service is integral to the success of your organization?

Preview

Session Evaluation

Instructions: Please read the statements below and mark the category that best represents your reaction to the statement.

	<i>Strongly Agree</i>	<i>Agree</i>	<i>Uncertain</i>	<i>Disagree</i>	<i>Strongly Disagree</i>
This training session helped me understand the opportunity we have as an organization to continuously improve the service we provide.					
This training session helped me to understand what I can do to become a service hero.					
As a result of this session, I am clearer on how we can work together as a team to create the type of environment we want in dealing with our customers.					
The objectives of the program were clearly presented.					
Opportunities to ask questions and discuss issues were sufficient.					
The session was well organized.					
This session provided valuable ideas that I can implement in my daily activities.					

One thing I'm going to start doing differently as a result of this session is:

This program could be improved by:

Additional comments:
