



Customer  
Service  
Agenda

Facilitator's Guide

# Six Steps to Greatness

Facilitator's Guide

Preview

## TABLE OF CONTENTS

### *Six Steps to Greatness*

#### **Introductory Materials**

Overview of Program.....	12
Program Learning Points.....	12

#### **What to Do Before the Program**

Reviewing for Relevance.....	15
Developing Your Agenda.....	19
Sample Session Agendas.....	20
Blank Session Agendas.....	21
Training Session Checklist.....	22
Pre-Session Communication.....	24

#### **Conducting the Session**

Materials Checklist.....	28
Introducing the Session.....	29
Introductions.....	31
Customer Service Excellence - What does it mean to our customers?.....	33
Video - <b>Customer Service Agenda: Six Steps to Greatness</b> .....	34
Six Steps to Greatness - Gallery Walk & Discussion.....	36
Resources Needed/Barriers to Eliminate.....	42
Session Review.....	43
Participant Action Plan.....	44
Conclusion, Evaluation, and Call to Action.....	45

#### **After the Session**

Follow-up Message.....	47
"Next Monday Morning".....	49
Baptist Health Care Standards.....	49
Additional Resources.....	50

#### **Materials Section**

Participant Handouts.....	52
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## SIX STEPS TO GREATNESS

### Overview of Program

*Customer Service Agenda: Six Steps to Greatness* is a video-based training program that demonstrates two key facts: (1) customer service can be consistently improved to the point that it rates at the top of independent surveys, and (2) it is not that complicated to achieve such a turnaround. (It is hard work, but not really complicated.) Rather it is common sense and 100% involvement by every employee at every level over a sustained period with constant training and reinforcement of the basics.

Six of the key steps that were used to drive a customer service turnaround at Baptist Health Care, from 10<sup>th</sup> percentile in customer satisfaction to #1, are explained by the people who actually implemented them. Together the turnaround team, consisting of all levels of staff including doctors and nurses, maintenance people and cashiers, tells the story of how they turned their hospital into one of the best providers of customer service measured in any industry. Because of the scope of the Baptist Health Care achievement and their consistency at remaining on top once they arrived, this material has a potential usefulness for fueling service improvement in any kind of organization from a Fortune 100 company to a small non-profit. Its lessons are universal.

### Program Learning Points

No matter what your organization, no matter what your industry, and no matter the position of your participants, this program has learning points that are relevant. The information works from a broad strategic point of view and from an implementation perspective. It helps to answer the question, "What can I do today to fulfill my role in service delivery?" It offers valuable insight into creating a dynamic customer service culture. As your participants go through the program they will learn:

- The importance of using Standards to fuel the process of developing and maintaining their customer service culture.
- How to hire and train to meet the expectations of the Standards.
- That every employee at every level is part of the service delivery team.
- To use teams to achieve higher levels of service.

- How to recognize service heroes.
- To develop winning attitudes among team members.
- That a truly great customer service culture depends on consistent measurement, modification, and incessant training.

Preview

WHAT TO DO BEFORE  
THE PROGRAM

Preview

## REVIEWING FOR RELEVANCE

Like its predecessor, *Customer Service Turnaround: Service Heroes*, the video *Customer Service Agenda: Six Steps to Greatness* is based in a hospital. Your audience, if working in an industry other than health care, may at first wonder what they have in common with a hospital. They don't deal with life and death! Your job as Facilitator is to assist them in looking past the location to the ideas presented in the program. These ideas are powerful and apply everywhere. Concepts like developing standards, hiring the right people, recognition techniques, and continuous improvement can help any organization to develop a culture where customer service is the number one focus.

One approach you may want to take is 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 Baptist Health Care reached the top, they stayed there for 5 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. Take the following steps to review and relate *Customer Service Agenda: Six Steps to Greatness* to your organization.

### STEP ONE:

**Make sure you 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.

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- How are the key points relevant to my organization?

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

- Create Standards: Achieve Buy-In

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- Hire and Train the Standards

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- Get it Done with Teams

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- Recognize Service Heroes

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- Accept Only Winning Attitudes

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- Measure, Correct, and Train Incessantly

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Preview

## Step Two:

**Identify areas during 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 *Six Steps to Greatness* 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 to 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 three areas where any organization should be able to make a connection to the video. They are "universal" points about service excellence:

- How they involved frontline employees in writing the Standards so "buy-in" could be enhanced from the outset.
- How the Standards are introduced and promoted before prospective employees even sign their applications.
- How the intangible notion of "attitude" is actually one of the most tangible aspects of change for the better.



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

Preview

## DEVELOPING YOUR AGENDA

Before developing the agenda for *Six Steps to Greatness* session, take a moment to step back and look at the big picture. Ask yourself the following questions to assist in developing how you plan to 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?

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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?

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

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

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

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

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## SAMPLE SESSION AGENDAS

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

We've provided suggested agendas for both a 1.5 and 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-1.5 Hours**

- 5 minutes Introducing the Session
- 10 minutes Customer Service Excellence - What does it mean to our customers?
- 15 minutes Video-*Customer Service Agenda: Six Steps to Greatness*
- 45 minutes Key Steps Gallery Walk and Debrief
- 10 minutes Personal Action Plan
- 5 minutes Conclusion, Evaluation, and Call to Action

### **Suggested Agenda-2.5 Hours**

- 5 minutes Introducing the Session
- 10 minutes Introductions
- 10 minutes Customer Service Excellence-What does it mean to our customers?
- 30 minutes Video- *Customer Service Agenda: Six Steps to Greatness*
- 45 minutes Key Steps Gallery Walk and Debrief
- 10 minutes Break
- 30 minutes Resources Needed/Barriers to Eliminate
- 5 minutes Session Review
- 10 minutes Participant 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 suggested agendas on page 19 and create your own. You may wish to 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.
- ❑ 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 or small group seating. Ensure all seats have a good view of the audiovisual equipment.
- ❑ Check that the VCR and monitor are working properly. Make sure you know how to control volume, tracking, and color.

- Check that the videotape is rewound.
- 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 of **Six Steps to Greatness**
- Facilitator's Guide
- Participant Materials
- Overheads/PowerPoint Presentation
- Video player and monitor(s)
- 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 \_\_\_\_\_

Preview

## PRE-SESSION COMMUNICATION

If your organization and participants are like others, you'll find yourself competing for time and attention with many other daily activities and issues, especially since this session is targeted towards managers and leaders. To help get the most from your session, we suggest communicating with your participants before you meet to help them understand the goals and agenda.

Early communication will get them thinking about issues they may wish to learn or discuss. You may even want to have them do some work prior to the session to help get them in the right mindset. We have 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.

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*Greetings!*

*I'm looking forward to our time together in the upcoming session on enhancing the customer service elements of our culture. I know you're busy and I appreciate the time you've committed to attend. Rest assured that I will be doing everything I can to make the meeting informative, enjoyable, and worthwhile.*

*We will be working very hard to develop specific actions and ideas that you can immediately implement in your areas. In our session, we will be utilizing a short, documentary video called **Customer Service Agenda-Six Steps to Greatness**. It presents six of the key steps that were used to drive a customer service turnaround at Baptist Health Care in Pensacola, FL from 10<sup>th</sup> percentile in customer satisfaction to #1.*

*You may be thinking, "What can I learn from a hospital? We're not in the healthcare industry?" My answer is that what they accomplished with their turnaround is one of the greatest service stories we can find to benchmark. The ideas are powerful and apply everywhere. Concepts like developing standards, hiring the right people, recognition techniques, and continuous improvement can help any organization develop a culture where customer service is the number one focus.*

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

*The turnaround itself, the achievement of going from the bottom to the top, is the real story, and 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 Baptist Health Care reached the top, they have stayed there for 5 years! This is a story of rock solid, long-term service success. It is meritorious and important.*

*In our program, we will take a closer look at the specific steps that leaders at Baptist Health Care took to begin the transformation from worst to first.*

- *The importance of using Standards to fuel the process of developing and maintaining their customer service culture.*
- *How to hire and train to meet the expectations of the Standards.*
- *To use teams to achieve higher levels of service.*
- *How to recognize service heroes.*
- *To develop winning attitudes among team members.*
- *That a truly great customer service culture depends on consistent measurement, modification, and incessant training.*

*Make sure to note the following information:*

***Session:*** *Customer Service Agenda-Six Steps for Success*

***Date:*** *(Insert Date)*

***Time:*** *(Insert Time)*

***Location:*** *(Insert Location)*

*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. One of the topics you might want to think about prior to the meeting is how you would answer the following questions:*

***What are the main areas in which we need to have a clearer, more service-focused set of Standards? Who should write them? Do we do enough to recognize associates who deliver exceptional service? What can we do to target our recruitment and hiring to more service friendly candidates?***



*We'll be discussing your thoughts on these issues 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 have 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 done all you need to have your session go smoothly:

- Appropriate Space and Seating Arrangements
- Refreshments for Break
- Flip Chart and Stand
- Flip Chart Markers
- Masking Tape
- Computer and PowerPoint File
- LCD Projector with VCR Connection (or TV/VCR Unit)
- Video-**Six Steps to Greatness**
- Copies of Handouts for Participants
- Extra Pens and Pencils for Participants
- Copy of *"Next Monday Morning"* for each participant (optional)
- Copy of Baptist Health Care Standards for each participant (optional)

Preview

## 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.

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- Show PowerPoint Slide #1 - Title Slide

- Say:

*"Welcome to our customer service training session entitled **Six Steps to Greatness**. This is also the title of the video we will be using as the basis of our program today. It's a documentary about a hospital located in Pensacola, Florida. This hospital went from worst to first in customer satisfaction. Just a few years ago they were rated in the 10<sup>th</sup> percentile. They chose to turn things around and today are ranked #1 in customer satisfaction.*

***Six Steps to Greatness** speaks to the importance of having as part of our culture a genuine commitment to serving customers through highly energized employee associates who are engaged and focused on that goal. To provide great customer service, you have to get the most of your people everyday.*

*The video shows best practices and inspiring role models that I hope we can benchmark and use as models for ourselves.*

*In today's session, we're going to be reviewing six key actions the leaders of Baptist Health Care took to begin and sustain their turnaround. While we might not be as low in customer satisfaction as Baptist Health Care, we can still learn from the action they took to make their dramatic turnaround, and what we really want to consider are ideas to keep us consistently good. At the hospital, they have stayed at #1 or in the 99<sup>th</sup> percentile now for 5 years. Consistency is the goal for which we all need to strive.*

*As a leader in our organization, your commitment to a culture that promotes a focus on the customer is instrumental. We'll be looking at specific actions you can take to promote customer satisfaction. We will be working together to answer the question: What does it take to achieve excellence in customer and employee satisfaction, day-in and day-out, 365 days per year?"*

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

*"Specifically, in our session today, we plan to discuss the following:*

- *The importance of using Standards to fuel the process of developing and maintaining our customer service culture.*
- *How to hire and train to meet the expectations of the Standards*
- *That every employee at every level is part of the service delivery team.*
- *To use teams to achieve higher levels of service.*
- *How to recognize service heroes.*
- *To develop winning attitudes among team members.*
- *That a truly great customer service culture depends on consistent measurement, modification, and incessant training.*

***Transition to Introductions***

## INTRODUCTIONS

**Estimated Time:** 10-15 minutes depending on size of your group  
(Approximately 1 minute per person)

**Materials Needed:** Flip Chart and Flip Chart Markers, 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 leaders can do to create customer focused culture.

- 
- **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 participant to share what are some of the Standards he or she thinks need to be in place to create a customer service focused environment. What are some things they should and should not be doing? As each person shares what they expect, capture those thoughts by listing them on a flip chart page. You may wish to create two columns: one with the heading "What You Should Do" and one with "What You Shouldn't Do." List respective responses under each.

- After everyone has had an opportunity to share information, including what Standards are essential to a customer focused environment, review the list of items you captured on the flip chart.

- **You may wish to make the following statement:**  
*"These are all great ideas. As leaders, a big part of your job is to create the vision of what you expect when dealing with customers. All of these (referring to your list on the flipchart) are great. We'll keep these in mind and combine them with the ideas that we obtain from reviewing what Baptist Health Care implemented.*
- **Continue by asking:**  
*"We were able to come up with some useful ideas, which is good and bad. It's good because we have such great ideas, but bad because sometimes we don't do what we need to do to make them happen. Let's talk about that for a second. Why don't we follow through on some of these issues?" (Allow responses and discussion.)*
- **Continue by saying:**  
*"Part of what we want to do in our session today is to keep in mind some of the barriers that we have to overcome. Many of the ideas we came up with could be classified as common sense. But common sense doesn't always mean common practice because we don't do what we need to do to implement our ideas, both ours and those of our employees."*

*Transition to Customer Service Excellence  
- What does it mean to our customers?*

PREVIEW

## CUSTOMER SERVICE EXCELLENCE-WHAT DOES IT MEAN TO OUR CUSTOMERS?

**Estimated Time:** 10 minutes

**Materials Needed:** Flip Chart and Markers

**Purpose:** This activity helps individuals to put into words the vision of customer service in their organization.

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- Begin by writing the following statement on the top of a flip chart page:  
**Customer Service Excellence at (Insert the Organization or Department Name) Means...**
  - Tell participants that because of time limitations you will not be able to put together a specific customer service vision but you can take a look at what you think customer service excellence means to their customers.
  - Divide participants into groups of 3-5. Tell each group that they have five minutes to come up with their list of what customer service excellence means to their customers. Examples may include:
    - a representative who listens to my needs.
    - Standards and recognition programs for employee associates.
    - someone who follows up to make sure what they provided is working for me.
    - a person who has great product knowledge.
    - when someone does something extra, unexpected.
  - After five minutes ask groups to share their lists. Capture their thoughts on a flip chart page. You may wish to have each group share one thought and then proceed to the next group for a thought and continue doing a round robin until all ideas have been shared.
  - **Conclude by saying:**  
*"Again, some great ideas. And as you will learn through watching the video in a few minutes, it all begins with creating standards. While these may not meet the true definition of standards, they do a good job of creating a vision for what we see customer service excellence meaning to our customers in our organization."*

*Transition to Showing of the Video*



## VIDEO- CUSTOMER SERVICE AGENDA-SIX STEPS TO GREATNESS

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

**Materials Needed:** Video- *Customer Service Agenda-Six Steps to Greatness*, Video Playback Equipment

**Purpose:** Allow participants to view the documentary video *Six Steps to Greatness* and capture key learning points.

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- **Introduce the video by saying the following:**

*"As I've said before, the video we are about to see tells the story of an organization where everybody from top to bottom got involved in achieving the #1 ranking in customer satisfaction. What makes this so remarkable is that they had been languishing in the 10<sup>th</sup> percentile.*

*The people at Baptist Health Care accomplished one of the most dramatic turnarounds in customer satisfaction ever. But when it comes right down to it, it wasn't because of sophisticated formulas or approaches. It was a simple vision for what they wanted to accomplish and then a series of very focused actions to get to their goal.*

*As you watch the video, look at the key steps that leaders at Baptist Health Care took to make their vision a reality. Look at how they do things and be prepared to discuss how we can adapt some of these same ideas to help lead our organization."*

- **Show Video - 15 minutes**
- **Debrief by asking the following questions and stimulating discussion:**
  1. *Which individuals in the organization were key to making the turnaround happen?*
  2. *In the video, they made the comment, "If you don't improve, you die." What did they mean by that and what would it mean to our organization?*

3. *The video offered several ideas that we could use here at our organization. Which ones do you think might be particularly relevant?*
4. *At the end of the video they showed a short segment about one of the employees at Baptist Health Care, Sig Jones. They called her a service hero. What was so special about what she did?*
5. *Do we have anyone that you would consider a service hero? Why?*

*Transition to Six Steps for Greatness-Gallery Walk and Discussion*

Preview

## SIX STEPS TO GREATNESS-GALLERY WALK AND DISCUSSION

**Estimated Time:** 45 Minutes

**Materials Needed:** 6 Blank Flip Chart Pages, 6 Markers, PowerPoint Slides # 5 - #11.

**Purpose:** Allow participants an opportunity to share their own thoughts and ideas around the six steps for success introduced in the video.

### Facilitator Note:

Adult learners, especially those in leadership positions, learn best by being involved in the discussion and development of ideas that can be utilized in their areas. This exercise allows participants to share their thoughts and ideas on each of the steps introduced in the video.

- Prior to your session you will want to place six flip chart pages around your presentation area. Make sure to leave room between each for small groups to work.

Each of your flipchart pages should include a heading that relates one of the key points from the video program. Make sure you have a page for each of the following:

- **Create Standards: Achieve Buy-In**
  - **Hire and Train the Standards**
  - **Get it Done with Teams**
  - **Recognize Service Heroes**
  - **Accept Only Winning Attitudes**
  - **Measure, Correct, and Train Incessantly**
- After you have prepared the flip charts, take the bottom of the page and fold it upwards to cover the heading. Secure with a piece of masking tape so participants cannot see the heading.

- **Say:**  
*"I know that one reason you are leaders is because you have great ideas and the ability to rally people in support of them. What we'd like to do now is give you a chance to build on some of the points we learned from the video, **Six Steps to Greatness.**"*
- Divide participants into six equal groups. Have each group stand by one of the different flip chart pages. After they have gathered at their respective charts, have them remove the masking tape to show their heading.
- Tell participants they will have two minutes to write as many ideas they have about the specific step on their flip chart. The ideas could be things they are already doing in regard to the step or maybe some thoughts they have about utilizing the idea in the future. Be sure to emphasize the value of having their comments be action-oriented.
- Tell participants that after two minutes you will call a halt to their work and ask them to rotate clockwise to the next idea from the video. When they approach the second flip chart, they should review what the first group listed and add to it. They are not allowed to take anything off, just add to it. Inform them that after two minutes they will be asked to rotate again and that you will continue this "Gallery Walk" activity until they have had an opportunity to share their thoughts and ideas on all six steps from the video.
- Give each group a flip chart marker. It works best if you can have six different colors so you know which group made each comment. Tell each group to take their marker with them to each flip chart.
- Conduct the Gallery Walk
- After teams have made comments on all six steps ask them to seat themselves in their groups for further discussion.

- **Show PowerPoint #5 -Create Standards: Achieve Buy In (Heading Area Only)**
- Review the thoughts and ideas from the flip chart that correspond with this step. Ask teams to explain any ideas that are unclear.
- Reveal the rest of **PowerPoint Slide #5 and #6** and discuss the additional thoughts from the video. Feel free to add your own thoughts and comments that help make the information more relevant to your participants.

#### **Create Standards: Achieve Buy-In**

- Standards are the main driver of change.
  - Involve your teams in writing the Standards to get buy-in.
  - Everyone must be held accountable to the Standards, no exceptions.
  - The use of Standards must be a relentless effort that begins in the hiring process.
  - Designate a Standards Team to reinforce the Standards in newsletters, meetings, etc. Have them focus on a different Standard each month.
- **Show PowerPoint Slide #7 -Hire and Train the Standards (Heading Area Only)**
  - Review the thoughts and ideas from the flip chart that correspond with this step. Ask teams to explain any ideas that are unclear.
  - Reveal the rest of **PowerPoint Slide #7** and discuss the additional thoughts from the video. Feel free to add your own thoughts and comments that help make the information more relevant to your participants.

#### **Hire and Train the Standards**

- Make sure that new hires understand the Standards to which they will be held.

- Look for specific examples in interviews of where the potential hire has shown a commitment to customer service.
  - Provide training for everyone on ways to meet the Standards.
  - At 30, 60, and 90 days, have more senior associates conduct a Peer Standards Review with the new associate.
- **Show PowerPoint Slide #8 -Get it Done with Teams (Heading Area Only)**
  - Review the thoughts and ideas from the flip chart that correspond with this step. Ask teams to explain any ideas that are unclear.
  - Reveal the rest of **PowerPoint Slide #8** and discuss the additional thoughts from the video. Feel free to add your own thoughts and comments that help make the information more relevant to your participants.

#### **Get it Done with Teams**

- None of us is as smart as all of us!
  - Teams can support each other and hold each other accountable.
  - Remember to involve all teams, not just your department.
  - Promote cross team activities to talk about service successes, failures, and changes.
- **Show PowerPoint Slide #9 -Recognize Service Heroes (Heading Area Only)**
  - Review the thoughts and ideas from the flip chart that correspond with this step. Ask teams to explain any ideas that are unclear.
  - Reveal the rest of **PowerPoint Slide #9** and discuss the additional thoughts from the video. Feel free to add your own thoughts and comments that help make the information more relevant to your participants.

#### **Recognize Service Heroes**

- Service Heroes are those employees that provide service above and beyond what is normally expected.

- Recognizing successes will create champions who will instill the same desire to exceed expectations in others.
- Recognition should be individually oriented.
- **Show PowerPoint Slide #10-Accept Only Winning Attitudes (Heading Area Only)**
- Review the thoughts and ideas from the flip chart that correspond with this step. Ask teams to explain any ideas that are unclear.
- Reveal the rest of **PowerPoint Slide #10** and discuss the additional thoughts from the video. Feel free to add your own thoughts and comments that help make the information more relevant to your participants.

#### **Accept Only Winning Attitudes**

- A positive attitude can make almost anything happen.
- Don't accept negative attitudes.
- We all control our own attitudes.
- As a leader, you cannot change someone's attitude, but you can instill the understanding of the importance of a positive attitude when dealing with customers.
- **Show PowerPoint Slide #11 -Measure, Correct, and Train Incessantly (Heading Area Only)**
- Review the thoughts and ideas from the flip chart that correspond with this step. Ask teams to explain any ideas that are unclear.
- Reveal the rest of **PowerPoint Slide #11** and discuss the additional thoughts from the video. Feel free to add your own thoughts and comments that help make the information more relevant to your participants.

#### **Measure, Correct, and Train Incessantly**

- Find ways to measure customer satisfaction.
- Commit to making a change when you find things that need to be corrected.

- When you find something that needs improved, train your team on how to do it correctly.
  - Do not accept the status quo. Always look for ways to improve.
- 
- Conclude this activity by thanking participants for all their great ideas.

**Facilitator Note:**

If conducting a 1.5-hour session, you will want to transition into the Participant Action Plan. If conducting a 2.5-hour session, you will transition into a break and then into the "Resources Needed/Barriers to Eliminate."

Preview



## RESOURCES NEEDED/BARRIERS TO ELIMINATE ACTIVITY

**Estimated Time:** 30 minutes

**Materials Needed:** Six blank flip chart pages.

**Purpose:** To explore the six steps to success further by identifying resources needed and barriers to break down in implementation of the steps.

---

- Have participants remain in their original six groups that were created in the Gallery Walk.
- Give each group a blank piece of flip chart paper. They should still have a marker.
- **Say:**  
*"Ideas are only ideas. They don't mean anything until they are implemented. Two things you need to consider when trying to implement something are what resources are needed and what barriers you might face."*
- Assign each of the groups one of the six steps. Ask them to create a list of resources that might be needed to implement the step and barriers that might have to be broken down.
- Allow groups ten minutes to develop their lists. After ten minutes, ask each group to choose a leader to share their thoughts and ideas. Have each group post their flip charts to aid in the sharing of their ideas.
- As each group shares its thoughts and ideas, facilitate further discussion as appropriate.

*Transition to Session Review*

## SESSION REVIEW

**Estimated Time:** 5 minutes

**Materials Needed:** PowerPoint slide #12 and #13

**Purpose:** Review key points from the session.

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- Review the following key points from the session utilizing **PowerPoint Slide #12 and #13**. Add personal comments where appropriate.
  
- Session Review
  - *The importance of using Standards to fuel the process of developing and maintaining a customer service culture.*
  - *How to hire and train to Standards.*
  - *To use teams to get things done.*
  - *How to recognize service heroes.*
  - *To develop winning attitudes among team members.*
  - *That a truly great customer service culture depends on consistent measurement, modification, and incessant training.*

*Transition to Participant Action Plan*

## PARTICIPANT ACTION PLAN

**Estimated Time:** 10 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.

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- **Say:**  
*"While it's been great to spend time with you today and we've had some very good discussions, most important is what we do in the future. It's now up to you to take the subjects we talked about today and implement them."*
- Hand out a copy of the participant action plan and tell participants they have ten minutes to write down several actions 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.**
- At 10 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.

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- 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, and what could be improved.*  
  
*Additionally, as a final activity I would like each of you to share one key lesson or idea you learned today. It could be an idea or even an example that was shared."*
- Go around the room and have each person share an idea or thought. Feel free to make your own personal comments after each to help reinforce the numerous ideas they will be sharing.
- Thank participants for attending and remind them to contact you if they have any additional questions. Offer to conduct another review of the video or to loan it to departments or teams for their individual use.



**Preview**

**WHAT TO DO AFTER  
THE SESSION**



## **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, **Customer Service Agenda: Six Steps to Greatness**. I'm glad we had an opportunity to talk about the actions that Baptist Health Care undertook to make their dramatic turnaround and how we can learn from and implement some of them in our organization.*

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

- *The importance of using Standards to fuel the process of developing and maintaining a customer service culture.*
- *How to hire and train to Standards.*
- *To use teams to get things done.*
- *How to recognize service heroes.*
- *To develop winning attitudes among team members.*
- *That a truly great customer service culture depends on consistent measurement, modification, and incessant training.*

*I encourage you to use the personal action plan that you developed in the session as a working tool. As a leader in our focus on customer service, you have to do just that: lead! Be looking for ways to create a climate in your area where customer service is of the highest priority.*

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

*Remember, when it comes to customer service—we can't just focus on it some of the time, we have to focus on it all the time!"*

## "NEXT MONDAY MORNING"

Included in a separate file on the CD that was included with the *Six Steps to Greatness* 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 of Performance 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 publications 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 function 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.
9. Make copies for each participant.

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

- Participant Action Plan
- Session Evaluation

Preview

## Participant Action Plan

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Name:

Department/Division:

Date:

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1. On a scale of 1-5, with "1" being "Poor" and "5" being "Excellent", rate yourself and/or your department on each of the steps introduced in the video.

Create Standards: Achieve Buy-In	1	2	3	4	5
Hire and Train the Standards	1	2	3	4	5
Getting It Done Through Teamwork	1	2	3	4	5
Recognizing Service Heroes	1	2	3	4	5
Accept Only Winning Attitudes	1	2	3	4	5
Measure, Correct, and Train Incessantly	1	2	3	4	5

2. For those rated below average (1 or 2), what can you do to improve the area?
3. What are some ways that you can communicate the commitment you have for focusing on customers to your employees?
4. How can you get commitment from your team members to the standards you develop for customer service?
5. What additional training would help your team members provide even better customer service than they are currently providing?
6. What resources can you tap to make this training happen?

7. Who do you think is already a service hero in your department? What can you do to provide recognition for them?

Name:

Type of Recognition:

8. How are you currently measuring customer satisfaction?

9. What areas of your customer service could you be measuring better? How could you measure these areas?

10. What additional resources might you need to continue to focus on creating a climate of customer service excellence?

11. What specific barriers are you going to have to break down in order to ensure success in creating a climate of customer service excellence?

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 vision of what we would like customer service to be in our organization.					
This training session helped me to understand how I as a leader can help to develop a climate that promotes a customer service focus.					
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.					
<b>TOTAL</b>					

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

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This program could be improved by:

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Additional comments:

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