

# Elements of a Customer Satisfaction System



*Presented by:*

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# Agenda

- Questions and issues from the audience
- Elements of a customer satisfaction system
- Best practices and tips for customer satisfaction
- What's next – additional TTA needs

# Key Resources

- *Improving Quality and Access to Services and Supports in Vulnerable Neighborhoods: What the Research Tells Us.* Center for the Study of Social Policy, February 2007.
- *Improving Quality and Access to Services and Supports in Vulnerable Neighborhoods: A Customer Satisfaction Framework.* Center for the Study of Social Policy, February 2007.

# Who Are Our Customers?

- Family
- Agency
- Community

# Why is Customer Satisfaction Important?

- Directly affects the ability of customers to access and use services
- Critically important to the continuous improvement of services (ROMA cycle)
- Data is a key component of the needs assessment and strategic planning processes
- Customer focus empowers the individuals and families agencies serve
- Required by the Organizational Standards (1.3, 6.4)

# Organizational Standards 1.3 and 6.4

Standard 1.3: The organization has a **systematic** approach for **collecting, analyzing, and reporting** customer satisfaction data to the **governing board**.

Standard 6.4: Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.

# What does the Customer Value?

What satisfies their needs, wants and aspirations is so complicated that it can only be answered by the customers themselves.

Peter Drucker

# What does the Customer Value?

Many organizations are very clear about the value they would like to deliver, but they often do not understand the value of what they deliver from the customer's point of view.

Phillip Kotler, Northwestern University



# What is Customer Satisfaction?

- Highly personal assessment strongly affected by customer expectations
- Influenced by (1) contact with the service provider, and (2) personal outcomes
- Research shows is based on confirmation or disconfirmation of customer expectations
- Related to ability of customers to hold organization accountable
- Three customer needs: security, esteem, and justice

# Three Elements of Customer Satisfaction

Experience of customer-worker interaction

Satisfaction with service provided

Satisfaction with outcome

# Service Quality Factors

- Timeliness and convenience
- Personal attention
- Reliability and dependability
- Employee competence and professionalism
- Empathy
- Responsiveness
- Assurance
- Availability
- Tangibles such as physical facilities, equipment, and appearance of personnel

# Five General Operating Principles

- (1) Successful customer service companies listen to, understand, and respond - often in unique and creative ways – to the evolving needs and constantly shifting expectations of their customers
- (2) These companies establish a clear vision of what superior service is, communicate that vision to employees at every level, and ensure that service quality is personally and positively important to everyone in the organization

# Five General Operating Principles

(3) They establish concrete standards of service quality and regularly measure themselves against those standards. They guard against the common mindset that some margin of error is acceptable by establishing as their goal 100% performance

(4) They carefully hire people, train them extensively so they have the knowledge and skills to achieve the service standards, and then empower them to work on behalf of customers, whether inside or outside the organization

# Five General Operating Principles

(5) They recognize and reward service accomplishments, sometimes individually, sometimes as a group effort, in particular celebrating the successes of employees who go one step beyond the expected actions for their customers

# Four Components of Customer-Focused Organizations

1. Customer-focused vision and mission statements
2. Customer-oriented organizational culture
3. Attention to the total customer experience
4. Customer service standards and accountability

# 1. Customer Focused Vision and Mission Statements

- Focuses and guides employee actions (core values)
- Sets and manages customer expectations (performance management system)
- Contributes to instilling a culture of customer orientation (provides all employees the necessary information to effectively design, manage, and improve their processes)
- Examples:
  - Marriott (San Antonio, TX): 'Every guest leaves satisfied'
  - St. Luke's (KC): "The best place to get care, the best place to give care"



## 2. Customer Oriented Organizational Culture

- Often entails “a massive cultural shift away from what is convenient for the organization to what is needed by the service users”
- Requires multiple methods and strategies
  - Surveys and other feedback instruments
  - Employee feedback
  - Training
  - Incentives/reinforcement
  - Structures, process, and accountability
- Needs assessment and strategic planning should highlight customer feedback

# 3. Attention to the Total Customer Experience

- Conduct a “customer walkthrough” exercise
- Stress personal contact and relationships
  - Customers want personalized service
  - Remember names, personal details
- Attention to detail
  - Personal notes in database
- Physical factors
  - Emphasize comfort and convenience
- Organize procedures around customers (convenient, streamlined, timely and prepared)
  - Manage customer flow and queuing
  - Assistance with forms and referrals
  - Follow up calls/appointment reminders

# 4. Customer Service Standards and Accountability

- Behavioral change requires standards, not suggestions
- Develop customer service standards:
  - Customers first
  - Accept responsibility
  - Reach out and help
  - Initiate contact
  - Nurture others
  - Give attention to detail

# Case Study: KCEOC, Kentucky

- All programs and services collect customer satisfaction data on a monthly basis
- Customer satisfaction data is incorporated into an agency-wide scorecard
- Quality improvement team meets monthly to review data
- Results are reported to management team on a quarterly basis
- Management team reports to board on quarterly basis

# Focus on Frontline Staff

- Golden Rule: Treat employees well
  - Provide training and support
  - Create flexibility and empowerment
  - Recognize and reward
- Emphasize customer satisfaction in the hiring process
- Incorporate customer satisfaction in the orientation process and provide training (instill the organizational culture)
- Remove barriers to customer satisfaction
  - Favor the customer over the organization
- Involve employees in planning and improvement
- Recognize and reward employee performance

# Methods for Measuring Customer Satisfaction

- Comment cards (in-person, online)
- 1-800 numbers
- Surveys (in-person, online, mail)
- Complaint monitoring and resolution
- Focus groups
- 1-1 interviews
- Community meetings
- Quality improvement committees
- Testers and secret shoppers

# Sample Customer Satisfaction Questions

- When I entered the building I felt welcomed
- The facilities were clean
- I was helped in a timely manner
- I was treated with respect
- My needs were met
- I was informed about other agency services
- I would recommend the agency to friends and family
- I would be willing to provide additional feedback to improve services
- Comments – how can we improve
- From what area did you receive services?

# Tips for Feedback Instrument/System Design

- Ask questions that provide actionable feedback
- Use a Likert scale over Yes/No options
- Ask limited open-ended questions “What is the one thing we can do to improve our service...”
- Link methods to provide in-depth feedback (focus group follow-up based on survey responses)
- Take the surveys to the customers – ease, convenience, and incentives are key to response rate



# Diagnostic Questions for Developing a Customer Satisfaction Survey

- When do customers receive the initial survey?
- What is your target response rate?
- What training do you provide front line staff?
- What form is the survey in?
  - Comment card
  - Formal paper survey
  - E-survey (e.g. on an iPad)
- Are there issues around confidentiality and accessibility?  
What other feedback methods do you use?
  - Staff feedback
  - Complaint resolution
- When do you conduct follow-up?
- What is your structure and process for analyzing data?

# Basic Data Analysis Questions

- What were the trends the data identified?
  - Did some services get better responses?
  - Were there differences in services delivered in different locations or with different methodologies?
- Were there differences in responses from different segments of your customer population?
  - Parents of young children, parents with children of many different ages, single adults, older adults, teens, married couples, etc.
  - Partnering agencies, funding sources, government entities and policy makers, community organizations, tenant groups, etc.
- Did the customers offer any suggestions for improvement?

# Model Customer Satisfaction Process

1. Collect customer satisfaction data through multiple methods and sources
  - Customer surveys
  - Staff feedback
2. Monthly assessment of data by quality improvement committee
  - Identify and address immediate issues
  - Conduct assessments after service delivery
  - Review of outcome data
  - Monthly report to leadership team
3. Targeted follow-up interviews and focus groups
4. Quarterly meetings with leadership team
5. Quarterly leadership team reports to the board

# Future TA Needs

- Training topics
- Types of resources
- Types of trainings

# Contacts

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