



COLLECTIVE
WISDOM INC

None of us is as smart as all of us.



Washington Association
of COUNTY OFFICIALS



CUSTOMER SERVICE

Workshop Guide

Robert Brown, Ph.D.

Author of *Earn Their Loyalty* v1

Customer Service Workshop Guide

by Robert Brown

www.collwisdom.com

Collective Wisdom, Inc.
11700 Mukilteo Speedway, 201-1084
Mukilteo WA 98275 USA

bob@collwisdom.com

All rights reserved. No part of this book may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage or retrieval system, without the written permission of the author.

Copyright ©2017 by Robert Brown and
Collective Wisdom, Inc.



Washington Counties Risk Pool
Created by Counties for Counties



The 2017 Summer Training Series is brought to you in part by the Northwest Credit Union Association. Additional sponsorship support was provided by the Washington Counties Risk Pool (WCRP) and the Washington Rural Counties Insurance Program (WRCIP).



Workshop Agenda/Contents (times approximate)

Intro and Human Nature	1
<i>45 min</i>	
O – I Divide to HST	7
<i>45 min</i>	
BREAK	
Customer Service	12
<i>90 min</i>	
LUNCH	
Tools, Ideas and Such	18
<i>90 min</i>	
BREAK	
Implementing	23
<i>60 min</i>	
Review, Questions	
<i>30 min</i>	
Resources	34

Customers and Service

Please read and
fill out through
page 5

None of us is as smart as all of us.

Ancient Japanese saying
and motto of Collective Wisdom, Inc.

Providing good customer service isn't easy. You cannot mandate it, standardize it or make it happen through policies and procedures. You have to earn it. How do you earn it?

"It" by the way, is not simply behaving it a certain way with a customer. Good customer service is more an attitude than behavior. If you think of good customer service as an interaction between two people, you must understand the two people and what the interaction should be. And it probably should be different each time.

With that in mind, today we will take a look at people, you and everyone else and figure out how to make interactions as positive and productive as they can be.

Who are your customers?

A large, empty rectangular box with a thin black border, intended for the user to write their answer to the question "Who are your customers?"

Human Nature

People are funny. We have the most developed brains on earth, but when you hear a person (usually a male) yell, "Hey, watch this," you can usually begin calling for an ambulance right away. We go to casinos even though we know the house has the advantage. As soon as we drive our new car off the lot, it loses thousands of dollars of value. Some American adults believe that chocolate milk comes from brown cows.

Okay, sometimes our brains don't work quite as well as they should. But first responders run toward trouble rather than away from it. We are the most charitable nation in the world. Our work productivity is also top in the world.

But on the other hand, our state and national governments seem to be stuck. We're the fattest any nation has ever been. About two percent of us are geniuses about two percent complete morons with the rest of us somewhere in between.

The customer who walks through your door is a complex growing, changing amalgam of traits, abilities, interests, fears, intents, resources, and emotions, who deserves the best we can provide. **Our task today is to figure out who our customers are, what they want and need, and how to provide it.**

Assumptions

- What pleases one person may not please another person (and, what pleases a person one day may not please them on another day).
- There are bad ways to provide service, but no one best way.
- Usually you cannot MAKE something happen; the best we can do is increase the probability of something happening (or not happening).
- The best service is done through a high-performing team environment.
- The best customer service is an attitude, not a behavior.

Anticipated Benefits

1. All employees will become skilled service providers
2. A continuous improvement culture will be generated
3. Efficiency, morale and satisfaction will skyrocket

The objective of this workshop:

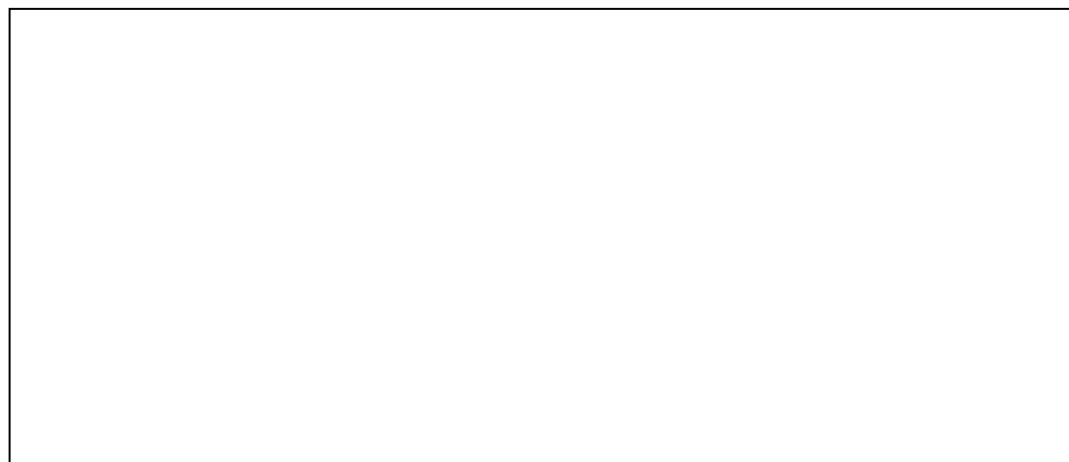
All participants will be able to design, implement and sustain an effective and engaging customer service improvement culture.

Is this a compelling task for you? YES NO

Why?



What else would you like to get out of the workshop?



In addition to what you personally seek from this workshop, we have three basic goals:

1. Understand the critical people elements of any organization, with an emphasis on Customer Service
2. Be able to balance all efforts of continuous process improvement with developing people and their interactions.
3. Create and sustain continuously improving customer service and developing people back at work.

The desired cultural change is for all employees to have the attitude that:

Every person with expectations of our organization

Will be pleased with the interaction.

How will you measure success (what will it look like, what will be in place; what will be happening?)

The Organization-Individual Divide

The eternal rift between an organization and the individuals who work in it.



Describe the O-I Divide in your organization



This painting (Persistence of Memory) by Dali is strange. What does it mean?

The Seven Billion Rule is:

Fantastic Training Opportunity!



THE OIL DRUM STORY

Harnessing the Speed of Thought (HST)

1. _____
2. _____
3. _____
4. _____
5. _____



THE BASKETBALL STORY

Ob-Quests to try

1. On the way to work you notice an employee driving recklessly.
2. Joe is chronically late to meetings.
3. Susan told a great story at a presentation this morning.
4. Your child got into a fender-bender this afternoon.
5. You received a “hero-gram” from a colleague.
6. Your boss used fake facts in a presentation today.

Tantastic Training Opportunity!

1. _____
2. _____
3. _____
4. _____
5. _____

CUSTOMER SERVICE

A customer is anyone who has an expectation of you while you represent the organization.

Describe good customer service you have received:

Describe poor customer service you have received

What is the difference? What does good service require?

THE FOUR Cs OF SERVICE

CONNECT
HUMAN-TO-HUMAN

COLLABORATE

CONTRIBUTE

CONFIRM

Practice with typical request and report out to rest of group

Do the four Cs meet our requirements of good service?

Foundation Review

What do you know now about your organization, people interactions and customer service?

TEAMS

“Talent wins games, but teamwork and intelligence wins championships.”
Michael Jordan

Teams

(In groups of 3-5 people)

List what you believe are the 4 most important characteristics of a solid team. Be ready to present to the larger group.

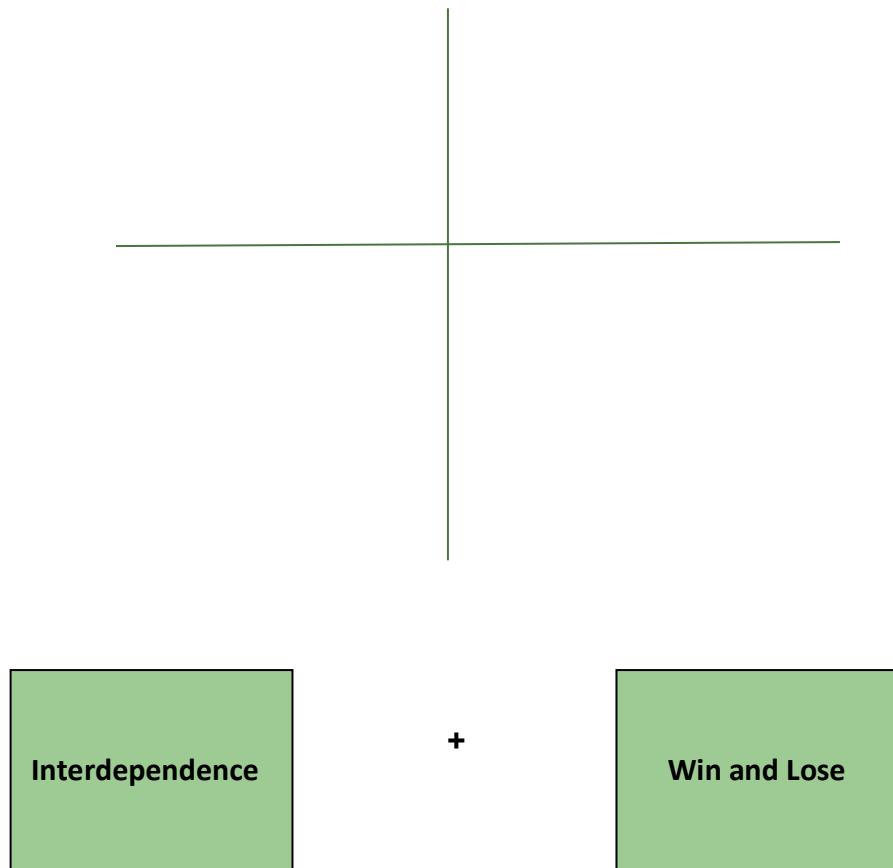
1. _____

2. _____

3. _____

4. _____

The Four-Part Teaming Model



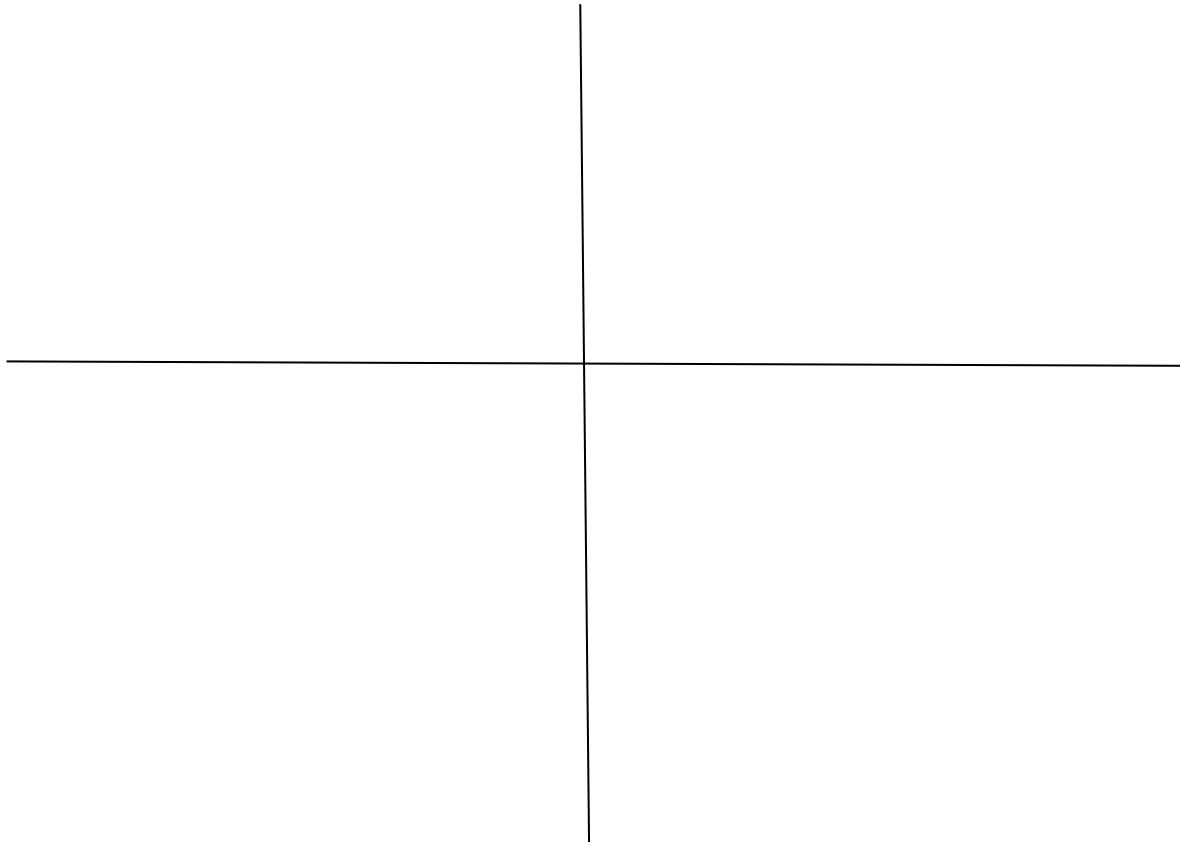
High-performing Teams are individuals who deliberately and openly fuse their individuality to pursue group goals and their teammates' highest good.



“Coming together is a beginning. Keeping together is progress. Working together is success.” Henry Ford

Form a learning team for today with the compelling task of learning what is important to learn today and successfully take it back to the workplace.

Share your effort.



The Value of VALUE STREAMS

Create a values stream of a common customer interaction. Be sure to include inputs and outputs.

A value stream are all the steps taken to add value (or not add value) to a customer service interaction. Each step is in the form of a verb and noun. For example, “Fill in application” can be one step in a value stream. Inputs can include customer expectations, difficulty finding parking, service reputation and the like. Outputs can include receiving a document, permission to act, more red tape, etc.

When you present your value stream, be sure to identify which steps actually add value (something they see as valuable to them) and which ones are done for other purposes, such as laws or regulations, record keeping, etc.

Extras

Every person-to-person engagement should include **SIR**

SERVICE

INFORMATION

RESPECT

Sometimes customers turn sour.

$F = E - R$

$A = F + H$

Significant problems can occur when the other treats you like an object or stereotype.

PERSONAL MISSION STATEMENTS

(A conscious or unconscious definition of what I want
from my job.)

My personal mission statement

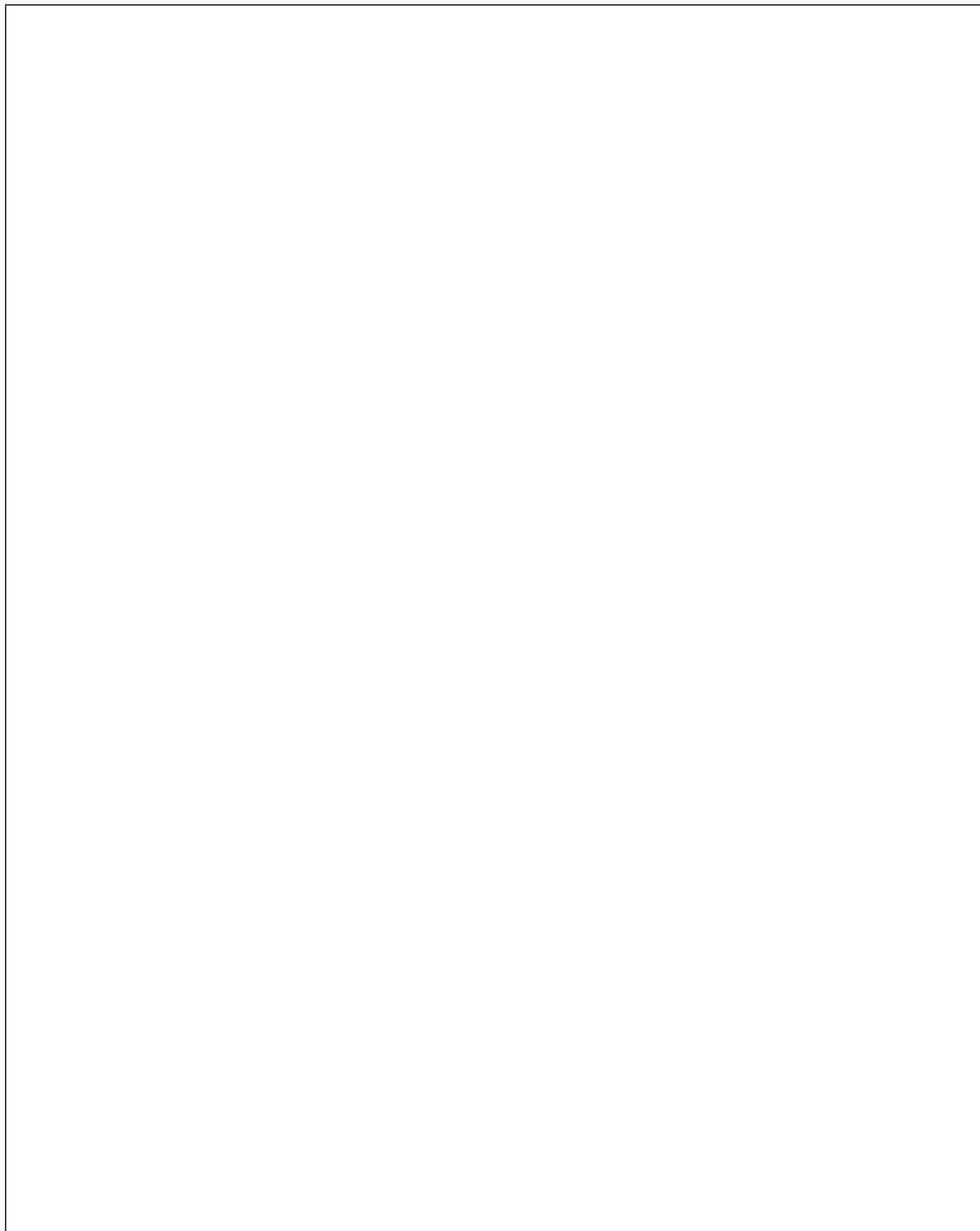
Personally meaningful vocational goals

Skills that should be acquired for good customer service and how they will be measured:

SKILL	MEASURE

Review

What do you know so far:

A large, empty rectangular box with a thin black border, occupying most of the page below the question. It is intended for the user to write their answer to the question "What do you know so far?"

Tools and concepts (use wisely—tools and concepts are not objectives)

- Huddles
- Feedback
- Organization's vision
- Measure relationship between customer and employee
- Skills maps (and visual control)
- Innovation
- Hand offs
- Virtual customers
- STORIES (stone masons)
- Moments of Truth
- Service as a promise (reliability is critical)
- Hope (customer makes an emotional investment)
- Customer is grateful
- Feeling special
- One person basic accountability for value stream
- Plan for unusual situations

Implementing

If you don't plan, you will fail.

If you follow the plan, you will fail.

Various successful army generals

Clarify the Issue:

When you return to work you will create and sustain an organizational customer service improvement culture. This is the proposed issue for you to address:

The Issue:

Making sure what was learned is well-implemented back at work

Define your goal

The goal (as measured by):

List hurdles

Hurdles:

List Possible Solutions

Possible Solutions (What tools, concepts, ideas are important--also can pick from list beginning page 28):

Create an Implementation Team (New?)

**Compelling
Task:**

**Sense of
Membership:**

**Influence on
Team:**

**Personal
Reward:**

Create an Implementation Plan

Issue:

Goal (AMB):

Hurdles:

**Possible
Solutions:**

**Best
Solution:**

Prepare the People (Checklists from The People Side of Lean Thinking)

The company has an emotionally engaging vision statement.

Employees know what the company vision statement is.

The company has a compelling mission statement.

Employees use the vision and mission statements to guide their work.

Employees have influence over how their work is performed.

Most improvement suggestions come from the workers rather than from leadership.

Leaders are eliminating their fat behaviors and acquiring lean behaviors.

Employees give leaders feedback on the leaders' improvement efforts.

There is a spirit of learning on all levels of the organization.

The work environment is kind.

Errors are addressed with a standardized and "Just" response.

Difficult conversations achieve satisfying outcomes.

Trying and failing is an accepted way of learning.

Every employee is taught how to be creative.

Every employee is given the support necessary to try innovations on-the-job or in simulations.

Effort, not just results, is rewarded.

Employees define change as part of the job, not a new initiative of some sort.

People see change as something they are in charge of, not something done to them.

Change helps fulfill the vision, not solve a crisis.

People love their jobs because they feel a sense of contribution.

People know they are an important part of a team doing important work.

Leaders are learning standardized leadership/management tools and models.

Prepare the People Workgroup Checklist

Each member of the team knows why he/she is necessary and valuable to the team.

Every member knows why every other member is important to the team.

Every member knows why the leader is important to the team.

The team has a compelling goal.

The team uses formal and informal ways to influence how the team functions.

All members of the team have declared personal rewards for being on the team.

The team is constantly trying to improve the various team value streams.

The team is learning process improvement tools just in time.

The team uses specific problem-solving tools.

The team leader is receiving constant feedback and is making changes as needed.

Prepare the People Individual Checklist

Someone in authority knows the employee's mission statement and is doing what is necessary to help the employee fulfill it.

Employees report that they are receiving their identified personal rewards.

Each employee can accurately declare why he or she is on the team.

Every employee reports an interest in moving toward great customer service by identifying and eliminating negative activities.

Every employee works with teammates on the value stream to create greater value.

Each employee enjoys a sense of belonging.

Each employee reports a rewarding work/life balance.

Every employee takes personal risks for the good of the company.

Respect the People Checklist

Employees define "Customer service" to include everyone and add value for all customers.

Improving the value stream is a team effort.

Employees own the value stream, not their jobs.

Interactions are customer driven.

Employees are trying new ideas on their work.

Standard work is defined at the lowest level.

Standard work is defined locally.

Information is shared globally.

Service tools are not goals.

No one leaves training or a meeting confused.

Training is to specified levels of skill.

Leaders are competent with “soft skills.”

Mistakes and unstable processes are frequently reported.

Grow the People Checklist

Employees are rarely, if ever, surprised.

Managers are often pleasantly surprised by their staff.

Employees accept accountability for value outcomes.

Leaders are effective storytellers.

Employees are providing more feedback than ever before.

Employees report being in a “partnership” with their boss.

Turnover is at historic lows.

Growing the people is measured in clear, public and reinforcing ways.

Employees repeat some of the great company stories.

Sustaining change is easier than ever before.

Employees give training high marks and request more training.

Employee performance continually improves.

More to Do Checklist

Leaders are working together to improve publicly declared management skills.

Company Service gurus have learned how to coach.

All employees are acquiring value-increasing skills.

Late adapters are supported.

Inadequate team members are helped to find more appropriate opportunities.

Process and people improvement are equally valued and reported on equally as well.

Employees enjoy significant work security.

Managers view teaching as one of the most important components of their work.

Managers use best practice management tools.

Employees are increasingly fulfilling their potential.

Resources

*The most valuable resources
are those within the heart.*

Bob Brown

Personal Mission Statements

Says what is important to you. It is unique to you. It helps you make decisions and helps you get what you want and go where you want to go. It is the roadmap to your life and happiness. It says what is important to you. If you were a ship, your personal mission is your rudder.

List some things that have made you happy or feel successful.	
List your core values, then underline your top five, circle which one is most important	
List ways you would like to make a difference at work	
Your most important goals	
Mission statement	

Personal Mission Statement Part II

What is your	
--------------	--

department's vision statement?	
What is your personal mission statement?	
What is the combined vision/mission statement?	
What needs to happen to fulfill this combined statement?	

Personal Mission Statement Part III

What do you need to do to fulfill the combined vision/mission statement?	
What do your co-workers have to do?	
What does the manager have to do?	

Personal (Vocational) Mission Statement Part I

It is unique to you. It helps you make decisions and helps you get what you want and go where you want to go. It is your roadmap for satisfaction and happiness. It says what is important to you. If you were a ship, your personal mission is your rudder. Name _____

Four steps to creating your personal mission statement

List some things that have made you happy or feel successful.				
Underline your top five values (or list others) then circle which one is most important to you.	Money	Happiness	Respect	Learning
	Relationships	Freedom	Contributing	Friends
	Health	Security	Family	Appreciated
	Free time	Recognition	Integrity	_____
Underline top three ways you would like to make a difference at work (or list others)-circle the one most important to you.	Customer satisfaction team member	Improve safety		Good
	Help co-workers Be friendly	Follow the rules		
	Work hard	Help make improvements		
	Lead others	Just do my job		
Mission statement—review above and combine into a sentence that best describes what you want to accomplish.				

Personal Mission Statement Part II

What is your department's vision statement?	
---	--

What is your personal mission statement?	
Is there a conflict between the two statements?	
Yes No	
If Yes- What needs to happen to be able to do both?	<p style="text-align: right;">When this is solved, finish the following</p>
If No	<p style="text-align: right;">↓</p> <p style="text-align: right;">↗</p>

Personal Mission Statement Part III

What will you do to fulfill both the department vision and your personal mission statement?	
What do your co-workers have to do?	
What does the manager have to do?	

_____ 90 Day Planner Staff Customer Both

Department _____ Date _____ End Date _____

Year Goal _____

AMB* _____

- AMB = As Measured By

90 Day Obj. 1. _____

AMB _____

2. _____

AMB _____

Resource	To Provide	When	How	To Whom
<input type="checkbox"/> Communications				
<input type="checkbox"/> Education Resources				
<input type="checkbox"/> Human Resources				
<input type="checkbox"/> Information Services				
<input type="checkbox"/> Organizational Development				
<input type="checkbox"/> Customer Service				
<input type="checkbox"/> Work Life				
<input type="checkbox"/> Policies and procedures				
<input type="checkbox"/> Data				
<input type="checkbox"/>				
<input type="checkbox"/>				

Reinforcements/Celebrations

1. _____

2. _____

3. _____

Under what circumstances

1. _____

2. _____

3. _____

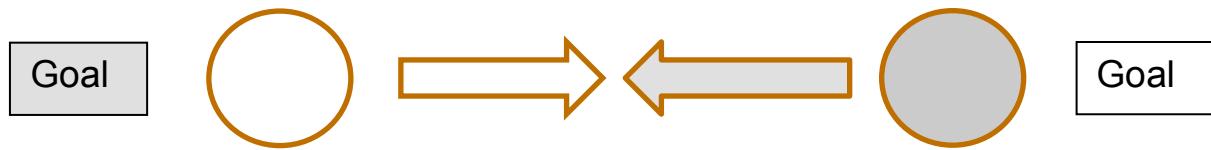
Results	Plan
1.	
2.	

Interacting

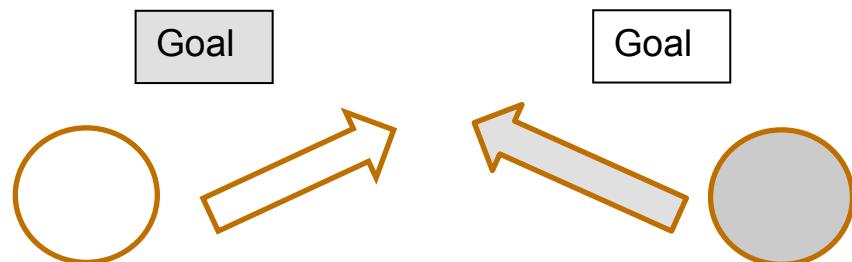
Conflict

Definition: when two or more people are in each other's way

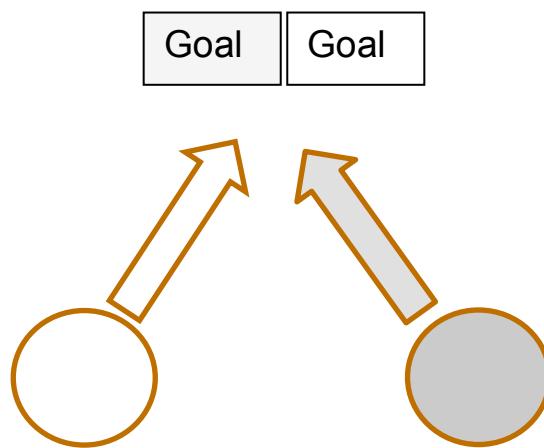
While trying to reach opposing goals.



Better



Best



References

Brown, Robert, "Crossing the Bridge or Walking the Plank," Management Issues.com, March 2014

Brown, Robert, "The Neglected Half of Lean Thinking," (Quality Digest, March, 2013)

Brown, Robert, **The HST Model for Change**, (2017)

Brown, Robert, **The Dark Matter and Dark Energy of Lean Thinking**, Introducing the Seven People Assets, (2014)

Brown, Robert, **The People Side of Lean Thinking: A Practical Guide to Change, Employee Engagement and Continuous Improvement** (2012)

Brown, Robert, **Earn Their Loyalty, Treating Customers and Employees Like People** (2011)

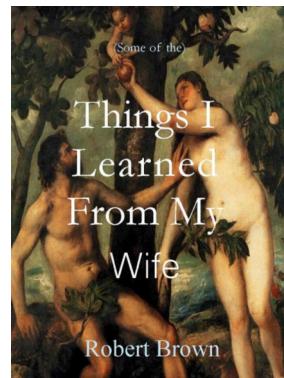
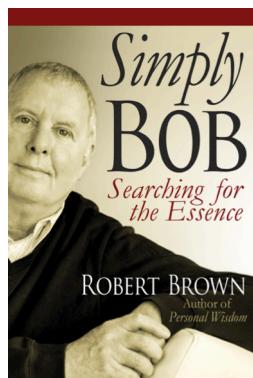
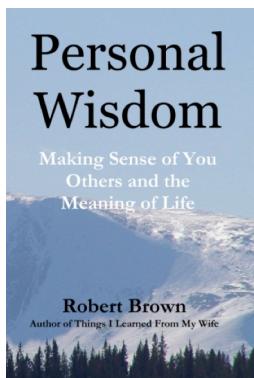
Brown, Robert, **Transparent Management: Unleash the Collective Wisdom of Your People** (2008)

Edmonds, Patrick and Robert Brown, **New Darwinian Laws Every Business Should Know**, (2016)

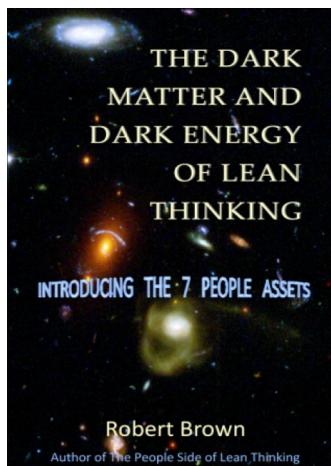
Grenny, Joseph, Kerry Patterson, David Maxfield, **Influencer: The New Science of Leading Change**, Second Edition (2013)

Patterson, Kerry, et al, **Crucial Conversations Tools for Talking When Stakes Are High**, (2011)

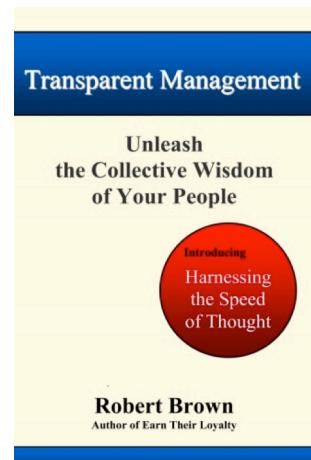
Williams, Rudy F. and Robert Brown, **Mistake-Proofing Leadership** (2008)



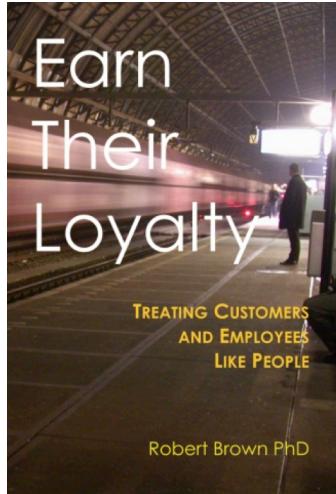
Robert Brown's Management books include:



A COMPLETE
INTRODUCTION
TO THE SEVEN
PEOPLE ASSETS



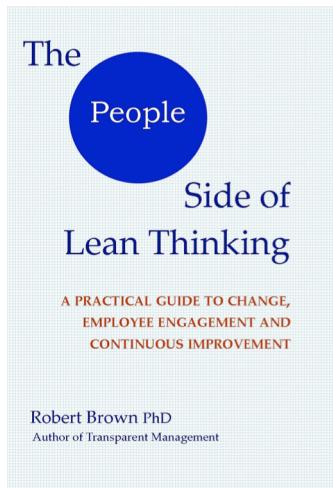
FULL
DESCRIPTION
OF HST, FOUR-
PART TEAMING
MODEL, THE O-
DIVIDE AND
OTHER IDEAS.



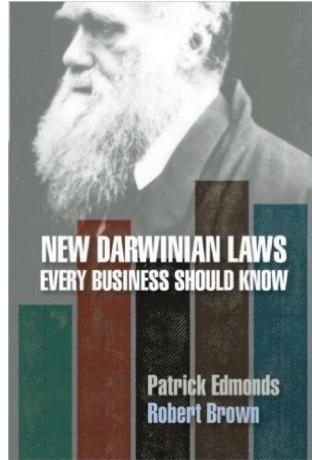
STORY OF A
LEADER
LEARNING
ABOUT
CUSTOMER
SERVICE AND
STAFF
SATISFACTION



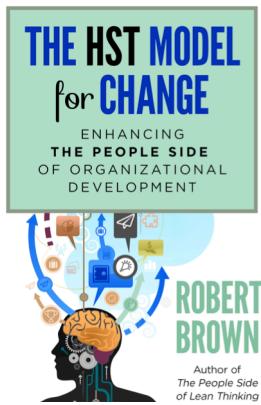
STORY OF A
GROUP OF
PEOPLE
LEARNING HOW
TO BE TRUE
LEADERS



HOW TO
IMPLEMENT
PROCESS
IMPROVEMENT
AND PEOPLE
DEVELOPMENT



THE LAWS OF
THE JUNGLE
APPLIED TO
MODERN
BUSINESS



A NEW MODEL FOR
SUCCESSFUL
ORGANIZATIONAL
DEVELOPMENT

About the Leader



Robert Brown is president of Collective Wisdom, Inc. He is a consultant on leadership, team and organizational development with over 45 years of experience and is the author of nineteen books.

He is a certified Lean leader and has a doctorate in psychology.

Bob lives with his wife and various animals north of Seattle almost within shouting distance of the grandchildren.

www.collwisdom.com

Bob's Current Workshops

The HST Model™ for Organizational Change

Powering Employee and Customer Satisfaction

Lean Thinking 4.0 for Every One and Every Place

Mistake-Proofing Leadership™

**Ten More Years of Life/Leadership Experience
Every Ninety Minutes**