

# Case Study

## Improving Customer Service with the *Work Expectations Profile*

### **The Client:**

The HR department of a state healthcare provider system contacted me for customer service training. The organization wanted to enhance the relationships among their administrative coordinators and staff. These 250 employees were spread throughout the state and worked in varying environments: hospitals, rural and urban clinics, etc. The staff also represented office managers, receptionists, bookkeepers, and accountants.

The organization was transitioning through a number of acquisitions; as a conglomerate of hospitals and clinics, they were constantly adding facilities to their organization. In addition, they were embarking on a number of technology transitions, particularly with regard to Medicare reimbursement. The transition to a new system-wide database would be time-consuming and involve a great deal of training and skill development.

The organization was committed to recognizing their staff. They understood that they couldn't grow and provide quality service to their patients without the commitment of their employees.

### **The Business Need:**

The organization wanted to focus on customer relations, but poor customer service was typically a result of how the coordinator treated his or her staff. For instance, if the coordinators were curt or didn't communicate well with their staff, staff was more apt to communicate poorly with their patients on the phone or in the clinic. It was the age-old adage that employees treat their customers (patients) the way they'd been treated by their boss (clinic coordinators). We needed to talk about employees' needs and the relationships between managers and their employees to improve customer service from the inside out.

### **The Solutions:**

We used the *Work Expectations Profile* in a three-part process. Part one was "Management's Role in Managing Expectations" with all clinic coordinators. Part two was "Identifying Employee's Expectations" with all clinic employees, and part three was "Understanding and Meeting Your Expectations" as a one-on-one meeting between coordinators and each of their employees.

### **The Delivery:**

Part One — During an annual management retreat to educate and motivate all clinic coordinators, I showed the video *I Wish My Manager Would Just...*, I introduced coordinators to the idea that the key to patient satisfaction is understanding and meeting employees' expectations. We discussed the need to offer supervision and feedback to employees. Without help, employees lose motivation and productivity drops. I tell managers that they'll spend the time one way or another: they can either let issues fester until they're almost out of control, or they can get out on the front line, learn what's important to their employees and work together to find ways to meet those needs. It's internal customer service.

Everyone completed the *Work Expectations Profile*. They realized the tool's usefulness to them and understood how beneficial it would be to their employees to complete and share their results with management. The group committed to holding one-on-one meetings with each employee before the end of 2002 to discuss expectations and suggestions to enhance the employees' work environment.

Part Two — During annual retreats with all clinic employees, we focused on meeting the expectations of their patients as well as their internal customers. We discussed what was expected of them (e.g., teamwork, positive attitude, punctuality, honest communication). Everyone then completed the *Work Expectations Profile*. The employees spent time learning about their three highest expectations and one lowest expectation. I posted 10 flipchart sheets around the room with each of the expectation categories and asked everyone to go to one of their

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highest expectations. In small groups they listed specific strategies for meeting their expectations, whether those strategies were currently in place or ideas to consider. These suggestions were compiled and distributed to the clinic coordinators before their one-on-one meetings.

Part Three — Clinic coordinators are holding one-on-one meetings with each of their employees to learn what their highest expectations are and what that means to them. Together they will discuss specific strategies that are currently meeting the employee's needs and suggestions for better understanding or improving an unmet expectation. In some cases, the clinic coordinator may need to provide open, honest communication or clarify a situation in order to resolve an employee's concern.

**The Results:**

The coordinators are following up with their employees right now. After all one-on-one conversations are completed, we will follow up to discuss the results with the coordinator group. During that half-day meeting, coordinators will be asked to share what they learned about their employees' expectations and how their needs are currently being met. In addition, we'll discuss suggestions for enhancing the clinic and/or overall working conditions and create action plans to address issues specific to the clinics and strategies that would affect the overall health system. A management response will be summarized and communicated back to all employees.