Creating a Culture of Service Excellence

MANAGER'S TOOL KIT

Based on the materials in *Unleashing Excellence - The Complete Guide to Ultimate Customer Service*

For Internal Use Only

Introduction

Greetings and welcome to the OpenMSU Service Excellence initiative at Montana State University. This Manager's Tool Kit has been prepared for you to assist in the implementation of Service Excellence in your department or unit at MSU.

During the month of March 2014, Directors and Department Heads attended a full-day workshop on Service Excellence as leaders identified to drive the implementation of this initiative. This tool kit will provide some ideas and templates for ways you can incorporate Service Excellence. Each department or unit at MSU has unique characteristics and "no one size fits all" in terms of how to incorporate these ideas. You know your departments best. Involve your staff in identifying ways to achieve excellence.

Please invite us to one of your meetings. We are happy to go over the history and progress of this OpenMSU initiative. We can work with you to facilitate a discussion of ways to start with your own specific implementation and share examples of what other departments are doing on campus. Service Excellence should be a journey, not a destination, and it can be fun for you and your staff.

Best wishes in your journey to "enrich lives by building a supportive environment that inspires excellence in everything we do."

_____   _____

Laura Humberger, Co-Chair   Betsy Webb, Co-Chair
Service Excellence Team   Service Excellence Team

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"People will forget what you said, people will forget what you did, but people will never forget how you made them feel."

Maya Angelou from Wouldn't Take Nothing for My Journey Now (1993) p. 12

SERVICE EXCELLENCE

We enrich lives by building a supportive environment that inspires excellence in everything we do.

SAFETY

- Maintain a safe and clean environment
- Report concerns in a timely manner
- Respect diversity
- Protect private and institutional data
- Review, update and follow standard operating procedures
- Maintain high ethical standards

COURTESY

- Be helpful to others
- Be approachable
- Be responsive
- Treat others with respect
- Exhibit empathy
- Demonstrate active listening

RELIABILITY

- Do what you say you are going to do
- Do it on time and do it well
- Be available
- Be honest and trustworthy

COMPETENCE

- Be an expert in what you do
- Have the knowledge, skills and abilities to execute responsibilities
- Demonstrate accuracy and efficiency
- Be resourceful and self-directed

www.montana.edu/serviceexcellence

MONTANA STATE UNIVERSITY
Mountains & Minds

SERVICE EXCELLENCE
AT MONTANA STATE UNIVERSITY

Why is MSU focusing on Service Excellence?
Surveys conducted through OpenMSU indicated that MSU needs a more robust service culture.

- Surveys were received from both service providers and those receiving services, such as principal investigators, faculty and staff.
- When processes and policies get in the way of excellence, the result is a non-service culture.

What is Service Excellence?
Service Excellence is aligning the quality of our services and environment with the excellence of our academic programs.

- Service Excellence provides a great experience outside the classroom, so that students and faculty can focus on being successful inside the classroom.
- Service Excellence includes providing excellent service to each other so that MSU is positioned to provide excellent service to students. It also creates a system to recognize those who provide excellent service.
- Service Excellence enables greater work satisfaction, more time focused on issues that advance the university, and less time worrying about internal issues.

How do we achieve Service Excellence?
View everything through the lens of the stakeholder, whether it be a student, colleague, community member or any other person with whom we come in contact.

- Everything speaks: pay attention to how things look, sound and feel with respect to the physical environment.
- Examine significant processes using service maps— focusing not on our own steps in the process, but on the stakeholder's viewpoint.
- Provide a framework for removing roadblocks through a Service Opportunity System.

MONTANA STATE UNIVERSITY
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MSU Service Excellence Team

Chair	Laura Humberger	LHumberger@Montana.edu	994-4361
Chair	Betsy Webb	Elizabeth.Webb@Montana.edu	994-4275
Service Excellence Administrator	Trevor Hildebrand	ServiceExcellence@Montana.edu	994-7760
Accountability	Kregg Aytes	Kregg.Aytes@Montana.edu	994-4423
Communications	Anne Cantrell	Anne.Cantrell@Montana.edu	994-4902
Everything Speaks	Jeff Butler	JButler@Montana.edu	994-7901
Measurement	Ian Godwin	IGodwin@Montana.edu	994-2677
Onboarding & Training	Cathy Hasenpflug Betsy Webb	Catherine.Hasenpflug@Montana.edu Elizabeth.Webb@Montana.edu	994-4284 994-4275
Recognition	Becky McMillan	BMcMillan@Montana.edu	994-6093
Recruitment	Tricia Wimbish	Tricia.Wimbish@Montana.edu	994-5527
Service Opportunity System	Matt Caires Justin van Almelo	MCaires@Montana.edu Justin.vanAlmelo@Montana.edu	994-2826 994-7464
General Information		www.montana.edu/serviceexcellence ServiceExcellence@Montana.edu	994-7760

Leadership Actions to Create and Sustain a
Culture of Service Excellence

MSU Service Philosophy and Standards
"We enrich lives by building a supportive environment that inspires excellence in everything we do."

Safety – Courtesy – Reliability – Competence

Communications **–** *Anne Cantrell –* Anne.Cantrell@Montana.edu *– x4902*
Communicates through a multitude of avenues to Faculty and Staff the impact they have in creating satisfied, happy, loyal students and stakeholders. Shares success stories and best practices from throughout the University.

Accountability – Kregg Aytes – Kregg.Aytes@Montana.edu *– x4423*
Develops and Implements mechanisms to ensure day-to-day use of our Service Standards and our Service Philosophy.

Everything Speaks – Jeff Butler – JButler@Montana.edu *– x7901*
Raises the awareness of the impact of the physical environment on the perception of our service. Uses a perspective of looking through the lens of the user of the process to identify more fluid and effective avenues to achieve the same, or better, outcome.

Measurement **–** *Ian Godwin –* IGodwin@Montana.edu *– x2677*
Measures the current and past satisfaction data allowing for identification of opportunities to improve our processes and systems to meet and exceed objectives, both in local departments as well as globally across campus. Works with Communications to display this information in an easy to interpret and visually diverse way to disseminate the data.

Onboarding and Training – Betsy Webb – Elizabeth.Webb@Montana.edu *- x4275*
                Cathy Hasenpflug – Catherine.Hasenpflug@Montana.edu *– x4284*
Leads the effort to build Service Excellence into every training opportunity for new and current Faculty, Staff and Employees. All training is tied back to our Service Philosophy or one of the Service Standards showing continuity of excellence in everything we do, providing better processes service to everyone.

Recognition – Becky McMillan – BMcMillan@Montana.edu *– x6093*
Creates recognition opportunities for individuals and groups that demonstrate our Service Standards and Service Philosophy.

Recruitment – Tricia Wimbish – Tricia.Wimbish@Montana.edu *– x5527*
Develops and maintains processes to locate and hire service-oriented personnel. Interview questions are tied back to the service standard and philosophy, and descriptions of the position are listed and described to communicate our service based culture.

Service Opportunity System - *Matt Caires –* MCaires@Montana.edu *– x 2826*
                Justin van Almelo – Justin.vanAlmelo@Montana.edu *x 7464*
Captures service opportunity improvements through a developed system to identify, resolve, and communicate these opportunities.

Service Excellence Staff Workshops

What:
Workshops provided for every employee at Montana State University as part of the OpenMSU Service Excellence initiative.

Workshop objectives:
- Introduce and explain the MSU Service Philosophy and Service Standards
- Practice techniques and tools to improve service
- Reinforce each individual employee's role in delivering Service Excellence
- Learn a common language of Service Excellence

Workshop content:
- What's happened so far
- Why do customers leave?
- Service Philosophy
- Internal Service and Teamwork
- The Service Experience
- Lens of the Student/Stakeholder
- "Everything speaks"
- Create a wow
- Active listening
- Service Maps
- "Easy to do business"
- Service Standards – Safety, Courtesy, Reliability, Competence
- Summary and next steps

How long:
Three hours in length, offered in the morning or afternoon, or by shift as necessary.

How to schedule:
Contact Betsy Webb at 994-4275 or Elizabeth.Webb@Montana.edu to schedule a workshop in your department or to learn about open enrollment workshops available.

How many can attend a workshop?
Capacity for the workshops is 24 participants.

Who provides the workshops?
15 MSU employees have been certified to facilitate the workshops. For a list of facilitators, please contact Betsy Webb Elizabeth.Webb@Montana.edu or Trevor Hildebrand ServiceExcellence@Montana.edu.

Open enrollment workshops:
Open enrollment workshops will also be offered. The workshops will be posted to the Service Excellence website.

Service Map Example

Process Analyzed: <u>Attend a Safety Training</u>

Step 1: Describe each step of the process through the "lens of **the** student/stakeholder."

1

The employee is told by supervisor that he/she needs to take safety related training.

2

The employee searches through personal records to see if training has already been completed.

3

The employee calls or emails Safety and Risk Management to locate training records and options.

6

The employee attends training and receives completion email.

5

The employee goes to registration site and registers for the course.

4

The employee is told which trainings he/she needs and if he/she has completed them.

7

The …

8

The …

9

The …

Step 2: For each block identified in step 1, describe what would be considered mediocre service and what would be considered excellent service.

Block Number	Mediocre Service	Excellent Service
1	*Supervisor tells employee that he/she needs to take some training – find out which*	*Contact Safety and Risk Management at 994-7760 to identify trainings you need to take and go ahead and register for them. Trainings I know you need and I want you to take are… They also have all of the information on their website if you would like to do this electronically.*
2/3/4/5	*Employee has to look through various emails and record locations*	*Employee has access to central record system with University username and password, to enter new job function which will automatically populate training schedule and can display training history.*
7	*Process repeats*	*Central record system automatically emails when refresher course is needed.*

Step 3: Choose one or two of the steps to focus on improving first, then move on to other steps that are determined to be areas of opportunity.

Everything Speaks Checklist Example

Date:

Conducted by:

Area:

Item	Satisfactory	Unsatisfactory	Action

Additional Comments:

Area:

Item	Satisfactory	Unsatisfactory	Action

Additional Comments:

Service Map

Process Analyzed: _____

Step 1: Describe each step of the process through the "lens of **the** student/stakeholder."

1

The …

2

The …

3

The …

6

The …

5

The …

4

The …

7

The …

8

The …

9

The …

Step 2: For each block identified in step 1, describe what would be considered mediocre service and what would be considered excellent service.

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Step 3: Choose one or two of the steps to focus on improving first, then move on to other steps that are determined to be areas of opportunity.

"Everything Speaks" Checklist

Date:

Conducted by:

Area:

Item	Satisfactory	Unsatisfactory	Action

Additional Comments:

Area:

Item	Satisfactory	Unsatisfactory	Action

Additional Comments:

"Regular" Meetings and Service Excellence Integration

- At weekly or monthly meeting with your teams, choose one of the four service standards (safety, courtesy, reliability, competence) and ask for examples of how these standards are being applied in the day-to-day settings of your unit's positions. Ask for specific examples and recognize the staff that are performing the service excellence examples.

- If any of your employees has been recognized with a "Random Acts of Excellence" card, share the good news with the rest of your team in a meeting.

- Revisit the MSU Service Excellence Philosophy, "We enrich lives by building a supportive environment that inspires excellence in everything we do." How do employees enrich lives? How are you building a supportive environment? What are you doing that inspires excellence in everything we do? Ask staff for specific examples and recognize those who are doing excellent work.

- Ask employees about ways they are providing service excellence, what examples do they see?

- If you have received feedback from any stakeholders (internal or external), share the feedback in regular meetings.

- If you would like to do any skill building or training in your meetings, invite an expert to your meetings to provide enhanced competence to the work you are performing.

- Ask staff members for their creative ways to incorporate Service Excellence into your regular team meetings.

Continuous Service Improvement Meeting

1. Put employees at ease by holding the meeting in a distraction-free environment. Silence pagers, phones, etc.

2. State the purpose of the discussion: To identify obstacles that get in the way of delivering exceptional student/stakeholder service.

3. Re-emphasize that continuous improvement is not directed at blaming people, but at improving processes.

4. Establish a cooperative environment at the meeting, following the rules for successful brainstorming:
   - Title flipchart: "What gets in the way of delivering exceptional service?"
   - Set allotted time for brainstorming.
   - Record obstacles on flipchart.
   - Encourage participation, log ideas and avoid critical comments during brainstorming.

5. After discussion, select one or two obstacles that are a major source of student/stakeholder complaints and frustration.

6. Generate as many potential solutions to the obstacle as possible. Often, the solution will be generated on the spot. The key is to keep an open mind and build on ideas. While not every solution presented will be feasible, it's important to respect the contribution.

7. For those solutions that will require time, study and resources to implement, discuss and agree on who will be responsible to work on a solution. Identify who else may need to be involved. The more involvement from the team, the greater the resulting buy-in.

8. Set a date to report back on status of obstacle and solution.

9. Thank employees for being honest in the session and express confidence in their ability to come up with solutions and your willingness to help them.

Note: The meeting should be kept short, positive, and to the point. Any promises made by management at the meeting should be kept.

Service Excellence – Language and Phrases

- Look at the process through the "Lens of the Stakeholder"
- Put yourself in their shoes
- "Everything Speaks" – be aware of your surroundings as to what you see, what you hear, what you smell and what you touch. What does each of these say to the Stakeholder?
- Pay attention to the details
- Attitude does matter
- Active Listening
    - Focus
    - Acknowledge
    - Rephrase
- Trigger vs. Calming Phrases

Trigger Phrases	Calming Phrases
I can't do that	**Here's what I can do…**
I don't know	**I will find out…**
That's what the policy says	**In order to protect you…**
I'll transfer you to	**I'll connect you with…**
That's not my job	**Let me find out what needs to be done.**
You'll need to call back later	**When would be a convenient time to get back to you?**
You have to…	**Let's do this first… then we can…**

- Safety: If people don't feel safe on our campuses or in sharing their personal information with us, we won't be able to function as an institution.
- Courtesy: People will remember how they were treated far more than anything else.
- Reliability: People expect us to follow-through on our word and promises; they count on us.
- Competence: If we don't know our jobs well or have competence in what we were hired to do, then we fail everyone - our students, co-workers and other stakeholders.

Three Steps to Coaching:

Coaching is used to reinforce behavior that you want to continue or increase. Use the Service Standards to support the behaviors you would like to see.

Step 1: Set the Stage. *Consider a specific employee who would be an appropriate coaching candidate and write down when, where and how you might coach this employee.*

_____

_____

_____

Step 2: Observations. *Note specific behaviors you have observed and describe how they are consistent with the Service Philosophy/Standards.*
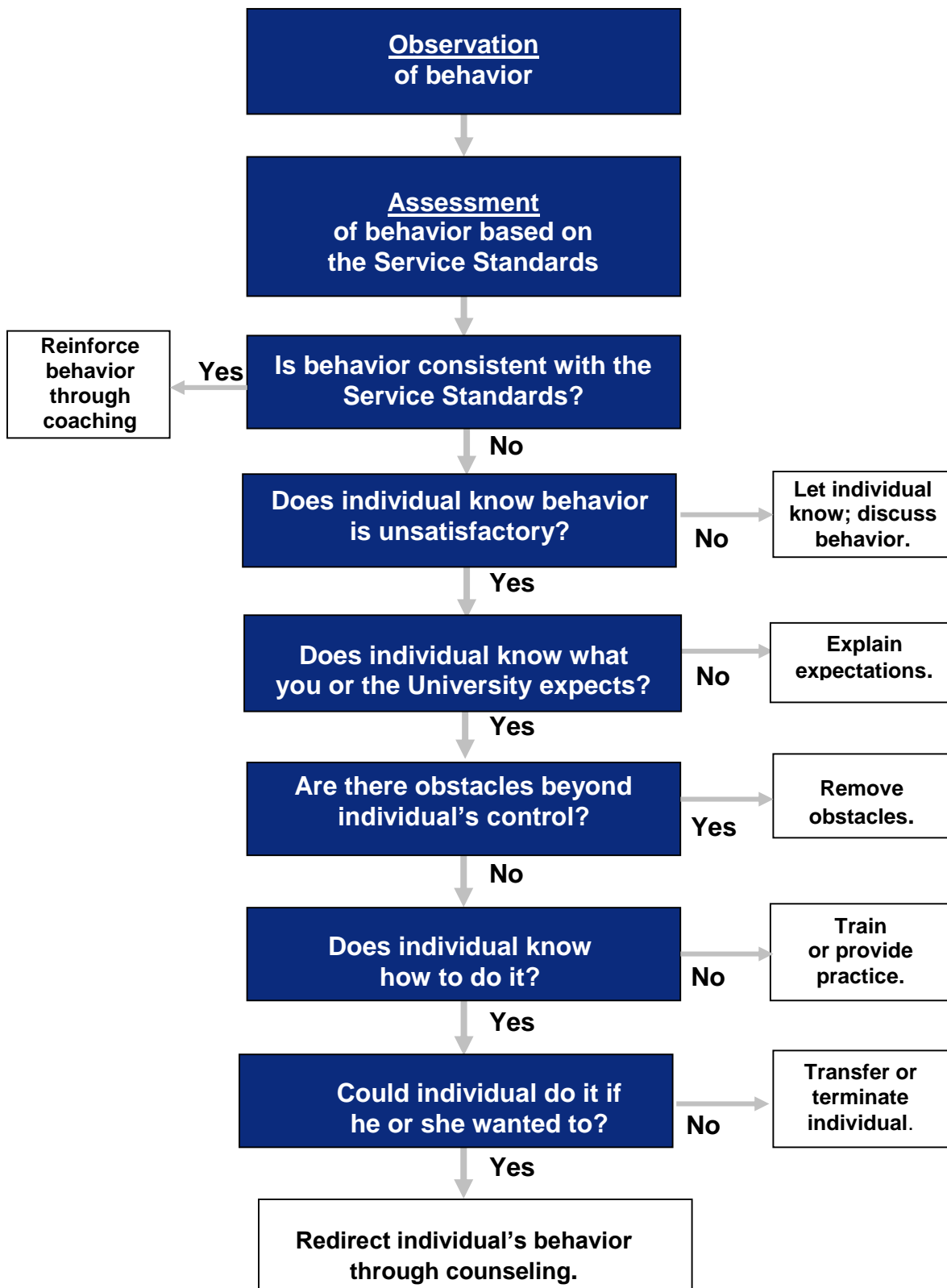
_____

_____

_____

Step 3: Reinforce Desired Behavior. *Explain why you value this type of behavior. Be sincere, specific and brief.*

_____

_____

_____

Performance Assessment Strategies:

Observation
of behavior

↓

Assessment
of behavior based on
the Service Standards

↓

Is behavior consistent with the Service Standards? — **Yes** → Reinforce behavior through coaching

No

↓

Does individual know behavior is unsatisfactory? — **No** → Let individual know; discuss behavior.

Yes

↓

Does individual know what you or the University expects? — **No** → Explain expectations.

Yes

↓

Are there obstacles beyond individual's control? — **Yes** → Remove obstacles.

No

↓

Does individual know how to do it? — **No** → Train or provide practice.

Yes

↓

Could individual do it if he or she wanted to? — **No** → Transfer or terminate individual.

Yes

↓

Redirect individual's behavior through counseling.

Six Steps to Counseling:

Counseling is used to redirect or correct behavior that you do not want to continue, that which does not align with the Service Standards.

Step 1: Set the stage. *Consider a specific employee who would be an appropriate counseling candidate and write down when, where and how you might deliver a counseling intervention. State your opening line.*

_____

_____

Step 2: Discuss your observations. *Note specific behaviors you have observed and describe how they are inconsistent with the Service Philosophy or Service Standards.*
_____

_____

Step 3: State the behavior you want to see. *Connect to Service Philosophy/Service Standard.*

_____

_____

Step 4: Listen to their response. *Predict the person's defensive communication style.* **(***Blamer, Reasoner, or Irrelevant)*
_____

Step 5: Let employee develop solution. *Ask employee to d*escribe a possible solution *(to be mutually agreed upon).*

_____

_____

Step 6: Set follow-up. *How and when will you follow-up on the success of solution?*

_____

_____

Service Opportunity System

A system to identify, resolve, track and communicate Service Opportunities is currently being developed. Upon completion, the system will be introduced to the University community.

If you have a service opportunity in the meantime, please pass it on to us at ServiceExcellence@Montana.edu. We will likely get back in touch with you when the system has been established to get more information to complete the process.

Recognition of Employees in Service Excellence

A process of recognizing employees who integrate the Service Standards to support the Service Philosophy is currently being developed. "Random Acts of Excellence" will be broadcasted throughout the University and the process to submit will be detailed in that communication. Please let us know if you have additional recognition ideas!
ServiceExcellence@Montana.edu

In the meantime, look at the rules and no cost ideas below to recognize an employee. If you provide employees with recognition that has cost associated, please ensure it is appropriate and contact HR if you have any questions regarding appropriateness.

Rules of engagement:
Be Specific
Point out the value added to the team/University
Tie the recognition back to a Service Standard or the Service Philosophy
Be timely with your recognition
Be sincere, say only what you mean

No cost recognition:
Verbal thank you (some individuals do not like public recognition, some do)
Email thank you
Hand written thank you
Have a director or your supervisor call or meet in person an employee to thank him or her
Share recognition feedback about employees in team meetings