



**Center for Process Excellence
Learning Services**

Customer Service Improvement Goals, Behavior Targets, and Training Parameters

 Alfred I. duPont
Hospital for Children
Nemours
Children's Clinic

Version: 1.0

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1.0 Overview

Before instruction will be developed, the elements that will affect it have been examined. The goals outlined in this analysis were derived from the NCC A.I. DuPont Hospital for Children Ambulatory Care Center (ACC) project purpose and the Patient Focused Service Standards document. The information in this analysis also considers all factors that will affect the delivery of the training program, such as the learning environment and Associate characteristics.

2.0 Instructional Goals and Behavior Targets

Each goal is observable and can be measured by one or more Associate behaviors. Each of these behaviors will require mastery of a type of knowledge. These goals and behaviors will drive the design of all assessment instruments (see Project Plan, page 4).

Goal	Behaviors	Knowledge Type
1. Associates will be ready to deliver excellent customer service.	Prepare	
	1. The Associate appears relaxed and recharged and displays relaxed body language and a smile.	Apply Guideline
	1. The Associate follows the dress code for his or her job.	Apply Guideline
	1. The Associate has read the Customer Service Guidelines Job Aid that day.	Apply Procedure
	1. The Associate has all job tools ready and accessible such as notebooks, software applications, reference sheets, etc.	Apply Procedure
2. Associates will make customers feel welcome.	Greet	
	2. The Associate initiates pleasant contact with the customer with eyes, voice, and body language.	Apply Guideline
	2. The Associate maintains complete attention with eyes, voice, and body language.	Apply Guideline
	2. The Associate gives a pleasant greeting that states his or her willingness to serve the customer. <ul style="list-style-type: none"> ▪ Greet the family by name; do not use “Mom” or “Dad” ▪ State your name (first name is OK) ▪ State your role in full detail (i.e. “I am a medical assistant and I will be weighing Johnny” or “I am going to be scheduling the surgical procedure that Dr. Cook is going to perform on Johnny”). 	Apply Procedure

2.0 Goals and Behavior Targets / continued

Goal	Behaviors	Knowledge Type
3. Associates will fully understand customer needs.	Listen	
	3. The Associate empathizes with the customer by sharing his or her concern and understanding of the impact on the customer.	Apply Principle
	3. The Associate directs the customer service process by following the steps outlined in the Customer Service Guidelines Job Aid.	Apply Procedure
	3. The Associate sets a comfortable pace for the customer such that the customer is able to understand and respond to the Associate as desired.	Apply Guideline
	3. The Associate defines the customer need or request by asking questions and recording information.	Apply Procedure
	3. The Associate checks his or her understanding of the customer's needs by restating this understanding to the customer.	Apply Procedure
	3. The Associate explains to the customer how he or she can help, or finds people and/or resources that can help.	Apply Procedure
4. Associates will meet or exceed customer expectations, wow them.	Serve	
	4. The Associate fulfills appropriate customer requests if able.	Apply Guideline
	4. The Associate asks for help if needed.	Apply Guideline
	4. The Associate directs and fully transition customers to resources outside the department as needed. He or she will give directions to areas at the site.	Apply Procedure
	4. The Associate promises to follow-up with the customer if needed.	Apply Procedure
	4. The Associate checks for customers' understanding by asking if they understand their paperwork, where to go next, and what to do before and after the visit.	Apply Procedure
	4. The Associate checks customer satisfaction by asking the customer how he or she feels about the visit, as well as direct them to the Customer Feedback Card or web page.	Apply Procedure

2.0 Goals and Behavior Targets / continued

Goal	Behaviors	Knowledge Type
5. Associates will make customers feel wanted and appreciated after every contact.	Thank	
	5. The Associate maintains pleasant contact with customers by using eyes, voice, and body language.	Apply Guideline
	5. The Associate says a pleasant “thank you” and “goodbye,” and state his or her willingness to serve customers again.	Apply Procedure
6. Associates will help unhappy customers feel satisfied.	6. Unhappy Customer Procedure. Associates follow the following procedure when working with unhappy customers: <ol style="list-style-type: none"> 1. Prepare yourself. Take a deep breath. 2. Listen to the customer completely. 3. Express your sympathy, and willingness to help. 4. Check your understanding of the complaint or need. 5. Apologize for us. 6. Take responsibility to help, but don’t take the blame. 7. Help. Do all you can. <i>Ask for help as needed.</i> 	Apply Procedure
7. Associates will be friendly.	7. The Associate always acknowledges others with appropriate eye contact and say “Hello.”	Apply Procedure
	7. The Associate always smiles and uses positive body language.	Apply Guideline
	7. The Associate frequently uses appropriate eye contact during the conversation.	Apply Procedure
	7. The Associate uses a pleasant voice tone and volume.	Apply Guideline
	7. The Associate observes families to detect their needs by looking and walking around lobby and service areas.	Apply Procedure
	7. The Associate responds to each family’s needs before they ask by always initiating contact.	Apply Guideline
	7. The Associate encourages families to go first on elevators, stairs, in hallways, etc.	Apply Procedure
	7. The Associate offers directions to customers who appear lost or who ask for help.	Apply Procedure
	7. The Associate welcomes new employees with a friendly greeting and genuine interest and support.	Apply Procedure

2.0 Goals and Behavior Targets / continued

Goal	Behaviors	Knowledge Type
<p>8. Associates will be professional.</p>	<p>8. The Associate lets nothing distract him or her while working with a family; he or she does not stop until finished with the family.</p>	<p>Apply Guideline</p>
	<p>8. The Associate is positive; expects the best from people and only says or does what will be helpful. He or she is able to predict positive results in a situation if a customer or Associate does the best he or she can.</p>	<p>Apply Principle</p>
	<p>8. The Associate uses proper introductions and language in person and on the phone.</p>	<p>Apply Procedure</p>
	<p>8. The Associate is calm and poised in difficult situations with families and staff. He or she follows the proper service recovery procedure and keeps his or her emotions even.</p>	<p>Apply Guideline</p>
	<p>8. The Associate leaves personal issues at home: Keeps attention on the families. Does not talk about personal problems while on duty; focuses all time on job duties.</p>	<p>Apply Guideline</p>
	<p>8. The Associate takes total ownership by doing all he or she can to help or find help for the customer, even if it is not his or her area. The Associate makes sure that the customer is taken care of and in contact with the next Associate before the customer leaves.</p>	<p>Apply Guideline</p>
	<p>8. The Associate masters his or her job functions and knows the local site customer resources.</p>	<p>Apply Guideline</p>
	<p>8. The Associate follows the dress code.</p>	<p>Apply Guideline</p>
	<p>8. The Associate offers positive and constructive feedback to staff when helpful.</p>	<p>Apply Guideline</p>
	<p>8. The Associate freely shares ideas for improvement.</p>	<p>Apply Procedure</p>

2.0 Goals and Behavior Targets / continued

Goal	Behaviors	Knowledge Type
9. Associates will be compassionate.	9. The Associate treats families and staff as they would like to be treated by assessing their needs and meeting them if appropriate.	Apply Guideline
	9. The Associate gives families and staff the attention and time they need. The Associate establishes and maintains appropriate eye and voice contact, as well as positive body language.	Apply Guideline
	9. The Associate is truthful and tactful by maintaining the dignity and self-esteem of the customer; the Associate communicates information in the most effective way for each family.	Apply Guideline
	9. The Associate expresses understanding and concern to customers and staff.	Apply Guideline
	9. The Associate empathizes with customers by asking questions to develop an understanding that he or she will confirm with them.	Apply Guideline
	9. The Associate gives helpful responses to the emotions of families and staff; he or she is not silent or inactive.	Apply Guideline
10. Associates will be united.	10. The Associate knows how his or her job performance affects other co-workers. He or she is able to explain his or her place and affect on the work flow.	Remember Process
	10. The Associate supports other departments when requested; collaborates by providing answers and other resources as able by email, phone, or in person. Directs requestors to other resources if unable to provide them.	Apply Guideline
	10. The Associate acknowledges the work of team members; tells team members that he or she appreciates their good work.	Apply Guideline
	10. The Associate encourages positive behavior by complimenting other associates when they do a good job. The Associate does not give attention to negative staff behavior.	Apply Guideline
	10. The Associate never says, "It's not my job."	Apply Guideline
11. Associates will be recharged and relaxed.	11. The Associate will recharge with any of the following: <ul style="list-style-type: none"> ▪ Taking regular breaks and lunch. ▪ Walking outside or around the building. ▪ Finding quiet spots to relax. ▪ Talking to a friend. ▪ Taking a deep breath before each customer. 	Apply Procedure

3.0 Training Parameters

There are many factors that will affect the achievement of the instructional goals. In addition to the broad performance factors outlined in the Performance Analysis, the training parameters discussed here must be considered to optimize learning.

3.1 Target Audience

Performance problems were found with Associates in scheduling, registration, all modules, and the check out area. These Associates are comprised of Patient Service Representatives, Patient Liaisons, and Medical Assistants. Overall, the level of customer service knowledge, health care experience, and education is lowest among the Patient Service Representatives and Patient Liaisons compared to the Medical Assistants. The former group typically has a high school or slightly higher educational level, while the later has college training and more exposure to customer service concepts.

3.11 Prerequisites

The customer service goals will not require prior knowledge of customer service, but rather, a motivation to provide good customer service. As stated in the Performance Analysis, the personal characteristics of many Associates make them a poor match for customer contact positions. However, there are no knowledge prerequisites that would bar them from achieving the instructional goals. It is a matter of attitude and management support.

3.12 Learning Preferences

Focus groups and interviews revealed that Associates prefer the following features in their training program:

- Face-to-face sessions
- Shorter sessions
- Visuals and audio
- Simpler language
- Learning by doing
- Frequent practice and feedback

3.13 Motivation

Again, motivation varies among Associates. However, this can be maximized if proper staff consequences are implemented as recommended in the Performance Analysis: There must be direct feedback and consequences to staff for their customer service performance and class achievement. Moreover, *management must lead by example.*

3.2 Environment

Most Associates will be studying at their desks or counter areas with many distractions and interruptions. Although much training will occur at staff meetings and in the Basic Live Class, there is a significant need for a more conducive study area, especially for the Basic Live Class. Of course, the work area is the preferred environment for the evaluations and other feedback. However, Associates will need a place they can study and work together to create training presentations.

3.3 Content Sources

All course material will be based on the following documents, as well as input from subject matter experts in the ACC:

- ACC Patient Focused Service Standards
- Focus Group Data
- Interview Data
- *The Service Advantage* (Karl Albrecht and Lawrence Bradford)
- Nemours Jacksonville Customer Service Training Modules
- Vendor materials

3.4 Evaluations

Level 1-4 evaluations will be delivered through these methods (see Project Plan, page 4):

- Associate Assessment
- Participant Surveys
- Course Assessments
- Self and Peer Assessment
- Manager Assessment
- Customer Service Feedback Card

4.0 Analysis Approval Signoff

This approval is given to Nemours Learning Services from the NCC Ambulatory Care Center (ACC) at the Alfred I. duPont Hospital for Children and refers to this analysis. The next deliverables will include the Customer Service Guidelines Job Aid, Customer Service Notebook, and Customer Service Scorecard.

5.1 Services

Nemours Learning Services will base the design, creation, and acquisition of all instructional materials on the goals, behavior targets, and training parameters in this analysis. Requested changes after approval of this analysis will extend deadlines and the project completion date, and require signed change order agreements from the ACC.

5.2 Contacts

The following contact is the primary sponsor who has reviewed and approved this analysis:

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Signature

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