

People Before Process Playbook



Putting People First, Missourians Serving Missourians



**Missouri Leadership Academy – Fall 2020 Team C
Customer Service Every Day**

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***To meet Missourians' expectations that their
state government deliver for them
as well as any organization.***

***"Excellent citizens serving their fellow citizens."
~Governor Michael L. Parson***

PREFACE

As state government employees, we have an important job serving the citizens of Missouri as well as our team members, and we are constantly striving to provide quality services. However, our customers are comparing the quality of the interactions and services they receive to private industry standards. Quarterly Pulse Survey Results have proven time and time again State of Missouri (SOM) team members genuinely care - we care about our organization, our team, and the people we serve.¹ And yet, current Quarterly Pulse Survey Results show that we only register at 34% for citizen focus and 51% for external orientation across state government.² One big takeaway from this data is that although we have made progress, we still have a long way to go which is why having a practical approach to helping teams is so important. While there are many different facets to customer service, we need a place to start. The People Before Process Playbook (Playbook) will provide you and your Agency with tools to transform the way you identify and understand the journey of your customer. By following these recommendations, we can embark on a journey where every state team member knows who their internal and external customers are- and why it matters.

GOALS

- Influence SOM team members to develop a customer service focus mindset
- Identify their customer, customer journey, and touchpoints
- Establish regular ENGAGE/Quarterly Progress Checks (QPC)
- Establish a baseline for current customer service satisfaction
- Define a measurement of customer service outcomes

BENEFITS

- Decrease Workload
- Provide Role Clarity
- Team Member Motivation

RECOMMENDATIONS

How do we put People Before Process?

ESTABLISH A CUSTOMER SERVICE CHAMPION

The first step in ensuring great customer service is raising awareness with leaders at all levels. Thus, each Department will need a Customer Service Champion. This may be done by appointing an existing leader in your Department, this position is not intended to be a “full time job,” therefore, no full-time position will be necessary. In addition, the Customer Service Champion should be an individual with the ability to influence the whole Department. Each Department will also need to appoint Customer Service Ambassadors at each worksite or division to assist with delivering the Customer Service Vision Statement. The Departmental Customer Service Ambassadors will work with middle managers to drive the necessary improvement through all levels of staffing while documenting best practices.

Some examples of best practices to implement may be:

- Obtaining buy in from leaders through promotion of benefits (listed above)
- Creating a Customer Service Vision Statement
- Determining what “good” looks like for your team
- Developing short and long-term goals
- Role-modeling
- Building trust between staff and team members
- Creating transparency

TEACHING THE FUNDAMENTALS

Teaching customer service fundamentals begins with leveraging the “how” each Department builds customer service skills. Customer service skills should be taught during onboard training of new employees and training of existing employees. There are numerous customer service MOLearning courses³ that can be utilized during both the team member onboard training and existing employee training. The numerous variants of Customer Service MOLearning courses will make it possible for each Department to identify training specific to its desired needs and outcomes.

The next step will need to be followed up with position-specific role clarity training by asking the question, “How does the work I do affect others and what does good look like?” Once a team member can answer these questions, they should feel empowered be able to effectively meet the needs of their customers.

Recommended MOLearning courses which focus on Customer Service Fundamentals and Role Clarity:

Frontline employee Courses:

[Customer Service Foundations](#) by Jeff Toister

[Creating a positive Customer Experience](#) by Jeannie Walters

[Writing Customer Service Emails](#) by Leslie O’ Flahavan

Additional Supervisor Courses:

[Leading a Customer Centric Culture](#) by Jeff Toister

[Customer Service Leadership](#) by Brad Cleveland

Role Clarity articles:

[ROLE CLARITY: Key to Organizational Success](#), article published by Jitendra K. Jena

[3 Keys to Role Clarity](#), article published by Bill Kica

ENGAGE TOPICS AND FOLLOW-UP

To ensure we are following up on the topics of fundamentals and role clarity, these should be a part of your regular ENGAGE/QPC conversations. Just as you answer questions about your team members' ability to meet the demands of their position, we should be asking clarifying questions to ensure they are thinking of their customers every day. This will require us and our team members to be accountable for our actions and their actions. If a member of your team is not talking to their supervisor about customer service or implementing the things they have learned, there should be consequences. This is also the time to document what things are working or still need to be improved. Encouragement and documentation of best practices will be key factors to promote this transformation across state government.

Some questions you may ask that provide role clarity and, ensure we are focusing on our Customers' Persona and/or the Customers' Journey are listed below:

Role Clarity

- Do you know who is impacted by the work you do?
- Do you know how the work you do affects others?
- Do you understand your role?
- How does knowing your customer help you to do your job better?
- How does knowing your customer add value to your work?

Customer Persona (See Attachment 1)

- Do you know the difference between internal and external customers?
- Do you know what good customer service looks like?
- What motivates our customers to pursue our services?
- Do you know how to empathize with your customer?
- How are you working with your customer and not against your customer to build trust?

Customer Journey (See Attachments 2 and 3)

- What are some touchpoints you've identified which result in low customer satisfaction?
- What are some touchpoints in which you've identified as redundant or not necessary?
- Do you have the necessary resources and training to meet your customer's needs?
- Has the way your customers engage with your position changed since we last met? (i.e. COVID, new program initiatives, new systems, etc.)
 - If so, have you updated your Customer Journey map?

When we start to answer these questions and act on the responses, this will allow us to "lean out" processes, which some should be familiar with if you have your Yellow or Green Belt for Lean Six Sigma.⁴ Furthermore, by developing and building these principles, we can remove wasteful processes from the customers' standpoint, provide role clarity to members who may question how their work impacts their customer, and provide overall job satisfaction. We all know the feeling of helping a customer, it is a gratifying and satisfying feeling. So let's get started!

SUSTAINABILITY

How do we make sure we don't lose sight of the fundamentals of this Playbook?

How do we make sure we make changes that will last?

These are hard questions to answer, but crucial to the success of each Department. We must make sure this is not the new fad that fizzles out.

McKinsey & Company recommends the 5 steps below to make state government better and to drive change within your organization.

1. Define where the organization wants to be
2. Assess and understand where the organization is today
3. Design the change journey
4. Manage the change journey
5. Sustain the change⁵

Define where the organization wants to be

Our organization wants to not just be there for our customers, but we want to serve them with the best customer service possible. We want to think of our Customers' Journey and "lean out" processes where improvement is needed. This is where the Customer Service Ambassadors designated at each worksite will direct their team members in accordance with the team's Customer Service Vision Statement.

Assess and understand where the organization is today

According to Team C Customer Service Everyday Survey⁶, SOM team members believe the work they do each day directly impacts the daily lives of their customers, but over 52% do not actively discuss their customers and their customers' journey during their ENGAGE/QPC meetings with their supervisors. This proves that we care about our customers, but are not challenged to think about them in our daily work duties.

Design the change journey

We need to drive change and to do this, we need to ensure your Customer Service Champion has regular meetings with their designated Customer Service Ambassadors to discuss their Customers' Persona, their Customers' Journey, and provide help on ENGAGE/QPC topics and answers.

Similar to the operating rhythm of the McChrystal Group Fusion Cell⁷, you have to meet regularly and review each task assigned out at the previous meeting. The meetings should always have an agenda and must tie back to the main goal of improving customer service in the work force. This means there will be team members sharing what was discussed with their colleagues outside of the meeting and could require a decision to be made within the meeting.

Manage the change journey

All Customer Service Champions, Customer Service Ambassadors, and Departments must be aware of the mission and vision of the Playbook to drive change, but how will we make sure we are making a difference?

Each Department should have a mechanism in place to gauge how they meet the needs of their customers. However, for us to know how we are driving change in all Departments on a larger scale, we need to answer questions on the Quarterly Pulse Surveys around External Orientation. However, collecting the data is only the first step, once collected, you must find a way to display it for your Department to review. The best way to review the data would be a Department Dashboard that is updated monthly with your customer service survey data. This will give everyone the visual they need to see what they do is making a difference!

Sustain the Change

How do we sustain the change?

Customer Service Champions and their designated Ambassadors will need to have regular meetings and decide the path of each change effort. We need to go back to the fundamentals. All team members should review the Customer Persona and their Customer Journey. They should watch MO Learning videos every couple of months to challenge them to think of new ways to enhance their customers' satisfaction with their Department.

Supervisors should be "walking the walk" and encouraging all team members to fill out the Quarterly Pulse Surveys to see how we are doing regarding citizen focus and external orientation.

Each Department should have regular conversations that include their Department's Dashboard to see where we moved the needle on customer service and where improvement is needed. Some things we may not be able to change for our customers, such as policy or regulations, but at least we know that we are serving our customers with the best possible customer service we can provide.

IMPLEMENTATION PHASES

What can be done Monday Morning?

- Meet with your teams, explain why it is important to know our customers.
- Give your teams the Customer Persona Worksheet, Customer Journey Canvas, and Customer Journey Mapping Worksheet and begin at least one of the Divisions customer journey.
- All supervisors and team members should watch recommended MO Learning courses listed in the People Before Process Playbook (Playbook).
- Establish your Customer Service Change Champion (CSCC) who can reach all Divisions within your Department.
- CSCC to establish Customer Service Change Ambassadors (CSCA).
- Customer Service Change Team to work with Human Resources to include recommended Engage/Quarterly Performance Check Topics in upcoming months and answers should be recorded for future use.
- CSCC with their Director to request new QPS data collection point.

Next 30 Days

- CSCC to establish a mission and share the mission with the Department's Divisions.
- Customer Service Change Team should define where the organization is headed.
- CCSC should request updates from CCSA's on what they found in their review of a customer's journey. Process Improvements?
- CSCC and CSCA's need to assess and understand where we are today, this can be determined using the answers gathered from Engage/Quarterly Performance Check Topics.
- CSCC should require routine customer service journeys to be mapped out.

Next 30 Days

- CSCC should provide an overview of what the team has found through their customer service journey mapping and accomplishments (completed monthly or quarterly). This information should be shared with their Divisions, through email or walk through video presentations like the Town Hall Meetings.
- CSCC and CSCA's should design a change journey.
- Follow up on customer journeys and process improvements to ensure sustainability.
- Request that more Customer Journey mappings be completed.

Ongoing

- CS Champion to manage the change journey.

ACKNOWLEDGEMENTS

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ATTACHMENTS

ATTACHMENT 1: CUSTOMER PERSONA WORKSHEET

This worksheet is a tool for team members to use to help identify their customers.

Being able to identify the people you serve will help you build a foundation of knowledge according to what your customer actually needs, rather than what you think the customer needs. Over time, this organization of data will allow you to discover that a relatively large percentage of customers' needs can be met with a relatively small amount of knowledge—given that customers so often ask the same questions. This in turn will make huge impacts in how team members work and what drives their everyday work functions.⁸

Group Customer Represents: This cell may be filled with an overall categorization of how this customer interacts with your Agency.

Background, Demographics, Goals, Challenges, and Expectations: These cells will be filled out from your customers' point of view. Understanding where your customer is coming from and where they are headed will help you gain the knowledge you need to better empathize with them and serve their needs.

Reflect on the things you already may have known or know now at the end of this process. Think about how knowing these different facts could impact that customer relationship with the service you provide.

ATTACHMENT 2: CUSTOMER JOURNEY CANVAS

This worksheet is designed to help get team members started on identifying the steps their customers must take to receive the service they are wanting.

First, identify a service you provide. Then, in each “sticky note box” write down a step in your customers' journey (i.e. phone call, visit website, send a text, fill out a form, etc.). Critically think about what your customers' needs are and what they must do to have that need met. Try not to skip steps. If you need more room, use another worksheet. Then, reflect on how satisfied that customer feels during each step. If you don't know- don't be afraid to ask! This will be the only way to determine what steps in your processes have room for improvement.

ATTACHMENT 3: CUSTOMER JOURNEY MAPPING WORKSHEET

This worksheet will promote additional reflection of team members after identifying their customer and mapping their journey, especially for those touchpoints resulting in low satisfaction.

Now that you have filled out the Customer Persona and Journey Canvas, take what you've learned and answer these questions. Focus on the steps identified in your customers' journey which may have resulted in low satisfaction for your customer. You may also use this worksheet to think about steps in your process which you may believe to be redundant or result in low motivation and answer the questions from your perspective.

Be sure to share these with your supervisor at your next ENGAGE/QPC meeting.

Attachment 1



Customer Persona Worksheet

People Before Process



Group Customer Represents

Background

Company Information:

Title:

Education:

Demographics

Goals

Gender:

Age:

Socioeconomic Status:

Location:

Short-term:

Long-term:

Challenges

Expectations

Business:

Personal:

When dealing with your agency:

When dealing with customer service representatives:



Customer Journey Canvas Worksheet



People Before Process

Customer Needs
What are the customer's basic needs at this moment?

Touch Points
What does the snapshot of this moment look like?

Customer Satisfaction
How satisfied is the customer at this moment?



Customer Journey Mapping Worksheet



People Before Process

Touch Point Identified

		Touch Point Identified	
Touch Points	List any touch point which resulted in a low customer satisfaction from the Customer Journey Canvas.		
Questions to Ask		Thoughts	Places for Improvement
Team Tasks	What is your staff doing at each step? Who does the client come into contact with?		
Customer Actions	What are the customers doing at each step? What decisions and actions are they responsible for?		
Questions or Barriers	What uncertainties do clients face? Is there language or jargon clients do not understand? What gets in their way?		
Motivations & Needs	What will keep people moving through the process? What information, benefits, motions, values, etc. will help them move forward?		
Gaps	What's missing right now from the process for the client? For the team?		