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Customer Service Strategy

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Customer Service Strategy Introduction

*This is the high level strategic view of Customers and the service ethos adopted by the University of the West of England for all interactions and initiatives for the provision of excellent customer service and continuous improvement. The culture of the organization is required to focus more on the experiences of the customer and these experiences need to become consistent across the University. Understanding these experiences and measuring them is going to be a fundamental part of the continuous improvement required to deliver effective services.*

**Customers:**

There are two main categories for the purposes of this strategy given the unusual environment that operates in the education sector.

1. Paying customers – students (staff using certain direct pay facilities)
2. Internal customers – staff subjected to Monopoly supply

The measurement and benchmarking of these will differ particularly where the customer (staff) has no choice but to use an internal service where the motivation to provide exceptional service can be sacrificed for operational reasons.

In terms of the strategy there should be no discernable differences to the customer service experience from either stream 1 or 2 above. The priority setting for initiatives and conflicting resources will always default to stream 1 as they are the primary customer in this relationship.

Further segmentation can indeed be operated in local service standards but the overall priority and focus should still be as above.

**Mission:**

***To provide service excellence to all our customers, focusing on their experiences of dealing with us, listening to their needs and building a culture of measures and continuous improvement to keep pace with their changing requirements.***

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1. **The fundamental principles of the strategy:**

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| **Key Principle** | **Characteristic** | **Comments** |
| Customers drive change  (Other things may create change but this strategy involves the customer at the heart of the system) | They are involved at every stage of the change process | We provide and exceed their requirements in service |
| Customers are always the priority | Nothing else is more pressing. | Other than another customer requirement. |
| UWE owns and manages the issue, not the customer | Once presented to UWE, the point of contact owns the issue on behalf of the organization. No passing around or chasing by the customer | UWE provides one organizational front, not a set of multiple departments to scale. |
| Urgency – channel selection and understanding of the needs | The response is fast and efficient, follow up is swift and contact is maintained throughout the period | The customer needs to feel the matter is important to UWE as well as to them. Self service mechanisms must also meet their requirements |
| Staff are confident, articulate and trained to handle customers correctly | Empowered to operate without constant referral, know their limits but seek closure | Staff want to help, they have an attitude that is invisible. They are empowered to resolve queries. |
| Measurement of service attributes | All points of contact must measure their performance against customer expectations | Realistic measures, simple but important to the customer. |
| Customers trust the organization | The interactions are equitable, standards are published and the message will be unambiguous. | Same answers to the same questions irrespective of the contact point. |
| Customer satisfaction is everyone’s responsibility | No hiding for back room environments. This is a team effort | All staff play a part in the overall satisfaction of our customers. If they don’t understand the drivers we cannot improve. |
| UWE customer performance known to all staff | Mechanism to articulate performance to all of UWE and teams on a regular basis | Top down driven with cultural backing from the senior team |

1. **Standards of Service:**

These standards will be created from customer input and regularly adjusted to keep pace with the expectations and feedback of all customer groups.

**Responsiveness** – answering of phones, dealing with queues, face to face, answering e-mail and other social media requests and of course correspondence.

These will be measurable and clearly set out at the point of interaction with the customer so that everyone is fully aware of the expectations.

**Behaviours** – The customer understands who they are dealing with, they are treated courteously and enthusiastically, their expectations are managed with a clear response schedule and ownership of their issue resides with the staff member.

A patient, calm interaction with empathy for the customer’s situation, delivered with confidence and a friendly attitude.

**Quality -** The service delivery will be consistent across all customer facing areas and supporting functions. This will be derived from feedback and continuous improvement involving the customers and their experiences.

Information and advice will be validated for consistency and accuracy across function to ensure the customer has the latest versions and staff are trained regularly with updates and changes to University policies and working practices.

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| **Organisational Principle** | **Characteristics** | **Comments** |
| Listen | Let the customer explain, ask questions to understand the needs. What are they seeking? | Polite open questions asking for clarity of information you have received. |
| Understand the requirement | Feedback your understanding to the customer of their needs, obtain acknowledgement from them before proceeding. | People don’t always articulate the real issue initially as there may be complex circumstances |
| Seek Solutions | Develop options with them for the optimal solution with constraints included. | There will potentially need to be a compromise in some instances. |
| Act | Take the agreed action and ensure the customer is clear of the solution or next steps | Always seek a solution rather than a referral. |

1. **People: (speed, simplicity & self confidence)**

The key attributes for people to provide excellent customer service fall into three broad areas:

1. Attitude
2. Skills
3. Job Knowledge

**Attitude** – this is the only aspect which cannot easily be trained and requires processes to identify the key areas of attitude. The recruitment elements are a key component for achieving success along with developmental training schemes to provide ongoing quality of service. We have to find people who actually want to help others as a key component of the skill set in this area.

**Skills –** Training to enhance already established skills for consistency are essential to deliver a service that can be replicated at every contact point for the customer. Some of the key areas that will need to be enhanced are:

Communication – including enhanced Listening skills

Interpersonal skills

Problem solving and solution seeking skills

Teamwork skills

In addition a sense of urgency making the customer feel like they were the only person the staff member was dealing with today.

**Job Knowledge -** Training in the business processes for the delivery of the service, experience of the overall university operation and the establishment of contacts to aid resolution of issues and problems.

**Recruitment –** establishment of problem solving questions to identify key attributes about team work, attitude and motivation towards helping others needs to be built into the recruitment processes right at the beginning. It would be desirable to allow this to filter candidates and take account of the particular dynamics of our customer profile. There is a competencies framework applied at the recruitment stage and this may need additional focus around the attitudinal aspects of behavior.

**Training –** in the principles of customer service, the strategy and the culture of the organization towards their customers is an ongoing requirement. This needs to be build into the recruitment phase and annual budgetary provision.

1. **Information Sources and Processes:**

The methods of obtaining the information to drive the customer service excellence revolve around listening, recording and taking action to align the services to the needs of the customer.

**Surveys** – electronic, face to face or distributed to large sections of the customer base. These contain the relevant questions to solicit real and achievable actions from the responses where possible. They will be used to obtain the overall picture on an annual basis.

Mystery shopping type exercises will provide the real experience of the customer provided they are undertaken in a realistic manner and anonymous.

**NPS** – net promoter score can be used at any time, its easy to deploy but is looking to obtain the real feel of the service at the time it was used. Would you recommend this service to a close friend or colleague? It is to be used close to the offering to obtain the maximum benefit as there are few if any supplementary questions to quantify its meaning. It measures the customers impression of the contact point and organizations support and training of the contact point.

**Listening channels –** everybody is effectively a listening channel provided they feedback to others who are prepared to listen and take action. Set up a focus where the management and team leaders are responsible for acting on feedback at a tactical level, (day to day) this informs the delivery of service and makes it more dynamic. They are empowered to adjust elements of the service tactically to improve the performance as perceived by the customers. Staff are encouraged to solicit feedback at the contact point and record their findings without being intrusive or delaying the process.

**Focus groups –** used widely but must be representative and facilitated carefully to avoid stronger characters influencing the outcomes and skewing the results. They are effective when dealing with specific issues that require more in-depth understanding and detailed changes to processes and services.

**Face to face feedback –** not dissimilar to listening channels but here the feedback is structured and requested in a formal manner. Key questions are asked via a personal interaction where clarification can be sought as to the response.

1. **Communications:**

Policies already exist covering accessibility, branding, use of media, appropriate methods and channels to use when delivering information to staff and students.

Customer Service includes the electronic methods of delivery and they need to meet the needs of our customers at those entry points from the legislative perspective but also the experience level.

The processes must clearly identify the actions required and the expectations of the responses at the entry points, this is to ensure that customers know what is happening and when it should have happened, rather than chasing activities needlessly.

**Key principles:**

1. They must be timely, responsive to interaction and not intrusive
2. These communications must fit with the desires of the individual but remain appropriate
3. The method must be secure and retain the integrity of all aspects of the institution and the customer.
4. Provide accurate information regularly updated to ensure actions taken are not later reversed or ignored by the University.
5. Provide the ability for self service from the customer without further referral where appropriate. Integrity and reliability are key aspect here.
6. The customer has a choice of methods used to be communicated with from the University.
7. Wherever possible the audiences should be as relevant as possible and targeted down to those who would benefit/be affected most closely.

In some instances there will be a preferred route of communication (emergencies) and this will be the only route used while a situation exists.

1. **Measures**

Customer Service measures need to focus on the experiences at the points of contact, typically responsiveness and follow up.

**Phones, Face to face, e mail:**

Answered in 3-4 rings, queue management set up to identify waiting time or position in queue if lines are busy.

E mail or equivalents, acknowledged by return, initial follow up in 24 hrs. (working hrs)

Face to face, Queue time kept below 3 minutes and identified as the target clearly displayed in the area for customers to see.

1. Staff identify themselves by name and function
2. The aim is to resolve the query on the first contact (target 70% or more queries resolved at that point)
3. The details are recorded and the customer appraised of the actions/follow up schedule.
4. Every contact point records the contact and the route preferred by the customer for any follow up.
5. Data analysis of type of query by volume and the fix time should be reported monthly.
6. Repetitive queries should be analyzed to seek improvements to reduce and eliminate the need for customers seeking clarification.

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| **Type of Measure** | **Criteria Applied** | **Target** |
| Who visited? | Student, staff, supplier | All enquires, one University |
| Why did they visit? | A problem, query, clarification, to complain | Removal of repetitive issues |
| What do they want as a resolution? | Resolution they require, not just what the organization can do. | Solution that is achievable and is at least satisfactory to the customer. |
| How did we resolve? | Fixed, follow up, investigation | Used to help fix future issues of a similar nature. |
| What action did the customer need to take | Reasonableness | Used to help future issues |
| How long did it take us? | Duration in minutes or hrs | First time fix 70% |
| Had they visited before? | Reasons | Removal of referrals |

1. **Continuous improvement**

Customer needs are dynamic and change frequently, mechanisms need to be established to detect and verify the needs that are changing. Surveys are not always needed to do this but the concept of listening channels can be used effectively.

Listening channels are staff directly and indirectly involved with the service picking up information from customers by asking questions about satisfaction and picking up on frustrations with the offering. These are shared and checked against other data to determine an alteration to the service but taking into account other side effects.

1. What does the customer want and expect?
2. How are we performing by analysis of our current measures?
3. What do we need to change to exceed the new expectations?
4. How are we going to implement it?
5. What checks and measures have we established to identify the improvement?

Customers drive change which requires knowledge about what they want and a desire to deliver it. The three most important elements are data about their satisfaction rates, the actual dissatisfaction areas and a timely response showing that the organization listens and reacts.

There are various models but using the 5 basic steps above will provide a close alignment to a customer driven organization.

If we are making changes in the organization, where is the customer data supporting the change clearly identifying their involvement and comprehensively matching the need from the customer perspective? What could be the implication on other areas of this change to ensure alignment of the organizations total offering not just one element that then becomes out of step with everything else driving dissatisfaction.

Benchmarking of external organizations as well as other HE organizations will be part of the processes involved with continuous improvement to ensure we are keeping pace with the market leader

1. **Complaints**

The complaints policy is already in place but it needs to be accessible and clearly articulated to the potential complainant. The process at UWE is comprehensive has three stages to it and is designed to resolve at the earliest possible entry point into the process.

The main focus is to rectify matters so as to avoid the formal process being engaged by the customer therefore empowerment and local support for staff is essential to allow a speedy and efficient handling of early potential complaints. It is also essential to identify the potential for a complaint to be escalated and take appropriate action.

Complaints provide opportunities for continuous improvement, adjustments to process and policies that have become outdated or inoperative over time. They also form the basis for prioritization of improvements due to the rule of thumb understanding that for every compliant made there are usually 12 others that have not taken the trouble to feedback.

1. **Reward & Recognition**

To achieve constant levels of attainment in service delivery staff are trained and provided with the appropriate levels of authority to deliver the service required. To maintain this activity level there are there components that drive the successful delivery:

1. Training and development in the skills required to carry out the role.
2. Performance management against a clear set of attributes/standards.
3. Recognition and reward.

For staff operating in these roles a framework of recognition should be established to maintain the momentum of high quality service and performance. Customer service staff are the face of the University and in many cases may be the only people the customer interacts with around how the institution works or fails to work, so they provide a key moment of truth in the eyes of the customer.

There are two levels of reward & recognition:

1. At the department or team level (could also be organisational level)
2. At the individual level

Team performance measured by the goals set out in the expectations and service standards applied to the function apply to all staff in the function to foster team effort and performance. Achieving these goals will trigger some reward at the team level.

For individual performance, a set of personal goals for the period, which carry attainment and fair correlation to others in the team. Exceeding these goals is the most likely reward scenario. Individual goals are most likely to be agreed at the PDR review and quarterly.

Rewards and recognition can be monetary and non monetary in format but must have some value attached to them to be worthy of promoting such behaviours and attainment of the goals.