Customer Service with a Purpose: Building a Customer Centric Culture

Indiana Housing and Community Development Authority

Management Innovation: Human Resources

HFA Staff Contact

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Summary

In 2018 the Indiana Housing and Community Development Authority partnered with the University of Indianapolis to develop a customer service training for all staff that went above and beyond the usual curriculum around courtesy and attentiveness. We realized many of our staff struggled to identify who was actually our customer and as an agency we were not focused on customer experience. We launched an 8 month long training series, one training session per month, building on defining who are customers are and what experience we wanted to provide for them.

Description of Project

In 2018 the Indiana Housing and Community Development Authority (IHCDA) wanted to offer training to our staff, and is often the case, the idea to offer customer service training was suggested. All of us can relate to sitting through a boring customer service training that talks about all the key topics—courtesy, timeliness, using the customer's name, etc. But IHCDA's executive team wondered if it could be done differently. In fact, IHCDA's executive team was not certain the staff even knew who our customer was. Our Chief of Staff was charged with exploring some possible options for a more robust training, one that might go beyond the typical tenants of "customer" service training.

We met with the University of Indianapolis and instantly knew they would be a great partner in this endeavor. They listened to our concerns about the subject and kept probing to determine what IHCDA's concerns were. One of our leadership concerns was that due to the siloed nature of many of our programs, customers were not receiving consistent service and our staff were not able to link customers with other programs within the agency they might benefit from. Also, there was perceived to be a general lack of service standards in place, and what existed varied widely from department to department. We wanted to create a culture that put emphasis on the customer and also delivered consistent experience across all interactions with IHCDA.

The University of Indianapolis proposed we start with some staff interviews. These were a mix of front line and manager-level staff. These were conducted by the facilitator, one on one, with 30 staff participating.

Front line staff questions sought to answer:

▶ What is the staff member's understanding about what a *customer* is and who their *customers* are?

▶ Can the staff member describe what constitutes great customer service *in their role*?

▶ Is the staff member confident they have the necessary knowledge to service customers well in their role?

▶ If no, can the staff member articulate what the knowledge gaps are?

▶ Can the staff member describe the critical best practices associated with a good customer experience?

▶ Does the staff member have a clear understanding of what customer service metrics they're accountable for and how those metrics contribute to the overall customer journey?

▶ Does the staff member understand the value in building internal and external relationships for the purpose of generating better outcomes for IHCDA customers?

▶ Does the staff member know "how" to build positive relationships with internal and external customers?

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The results were insightful. Staff could not cite to one common definition of a customer or what good customer service was. None could cite any metrics being tracked to determine if customer service needs were being met. Only 50% of staff reported they were well-trained and had the skills to deliver good customer service, and a surprising 20% felt they were inadequately trained and were concerned about their ability to deliver good customer service. Shockingly, 70% of those interviewed felt staff members outside their department were not well trained and the majority reported getting calls or emails they weren't equipped to handle so they did not respond or redirect the customer inquiry.

The question set for managers tried to set a baseline for:

▶ What role does the leader believe they have in making sure customers have a good experience or interaction with his/her department?

▶ What does the leader care most about when it comes to customer service?

▶ Does the leader have a good grasp of the knowledge needed across their team to deliver good customer service?

▶ Is the leader able take a more strategic view of their team's customer service activities, and how those services fit within the greater organization?

▶ Can the leader rely on staff members to review customer related best practices and metrics and provide quality feedback regarding changes and/or improvements?

▶ Does the leader have the ability to query or request data related to customer service metrics and coach staff members on improvements.

▶ Does the leader model good communication skills and encourage relationship building with internal and external customers?

▶ Does the leader exhibit good coaching skills around a variety of customer service topics and challenges?

▶ How does the leader encourage and model a customer centric environment within his department and throughout the organization

Again, the results were eye opening. Only 20% of managers felt their staff delivered great customer service. However, only 40% of managers felt it was even a priority to deliver great service. 75% stated that internal relationships needed work. 50% of managers felt more comfortable addressing customer knowledge gaps than educating their own team members. Their focus was on hiring talent as opposed to training or developing talent. Managers felt there was a lack of clear prioritization and that often they were too in the weeds. They also cited to a lack of clear communication and direction within IHCDA and the perceived barriers this created.

And so we set out on an 8 month journey to define who our customer was, to educate staff more about other departments within IHCDA to start breaking down the perceived barriers and to define what our priorities were as it relates to our customers. We divided staff into two groups: front line staff and our leadership team. Each group focused on the same topic each month, but the delivery was different for each cohort. The leadership team was coached around larger scale concepts and on defining who the customer of IHCDA was, what other groups we interact with, and what kind of customer relationship are we striving for.

Trainings offered included change management; customer service, teamwork/collaboration, marketing and branding, and product/service knowledge. During the final sessions on product/service knowledge each department presented on products and programs they offer, then staff were put on teams and presented with a

customer profile. Based on that profile, they had to recommend IHCDA products and services to that customer, including products and services from departments outside their own. This was a great opportunity to not only learn more about each department, but to understand more deeply who our customers are and what challenges they face. In trying to bring purpose to our customer service interactions, we actually helped ourselves understand more deeply our purpose as an agency.

Measureable Impact

Since 2012, we have distributed an annual agency customer service survey. We use this to gather formal feedback from our partners and sub-grantees. We distributed the survey in January of this year. The results were very positive. In fact, in four areas (bulleted below) we saw our highest rating in the last six years. This further illustrates the importance of this training and our customer centric culture at IHCDA.

- ▶ IHCDA staff are pleasant and courteous when dealing with IHCDA partners
- ▶ IHCDA staff keep their partners informed when policies and procedures change
- ▶ The IHCDA and IHCDA Info emails are helpful
- ▶ I feel comfortable asking questions of IHCDA staff.

Click here to access the survey.

Conclusion

This 8 month program laid a great foundation for IHCDA heading into 2019. We have taken what we learned and defined 3 groups IHCDA interacts with: customers, process partners and stakeholders. We have agreed that our customers must always be first in our minds as we create products, programs and services and as we make changes to existing ones. We need to be more intentional about hearing from those who use our products and services or are the end beneficiary of our programs. It can be hard to hear the voice of the customer, and we must be more pro-active in that.

But we realize that not all IHCDA staff interact with customers on a daily basis (if ever). They manage relationships with stakeholders and process partners (internal and external). And these relationships are critical to our success as well. But it was important to make sure that staff understand these groups are not our "customer" as much as they may try to convince us they are. And also important to understand that these groups do not always speak with the voice of our customer.

But we want every person we interact with to have a positive interaction with IHCDA. So we decided to adopt *service* standards, we cleverly dropped the reference to customer! Everyone we interact with deserves good service, in fact our best service.

So IHCDA's focus for 2019 is in adopting service standards in each department and continuing to develop staff soft skills around delivering that service. We will also be using metrics to track adherence to our service standards, incorporating a more robust survey mechanism for all those we interact with, and will be re-introducing methods to collect the voice of the customer.