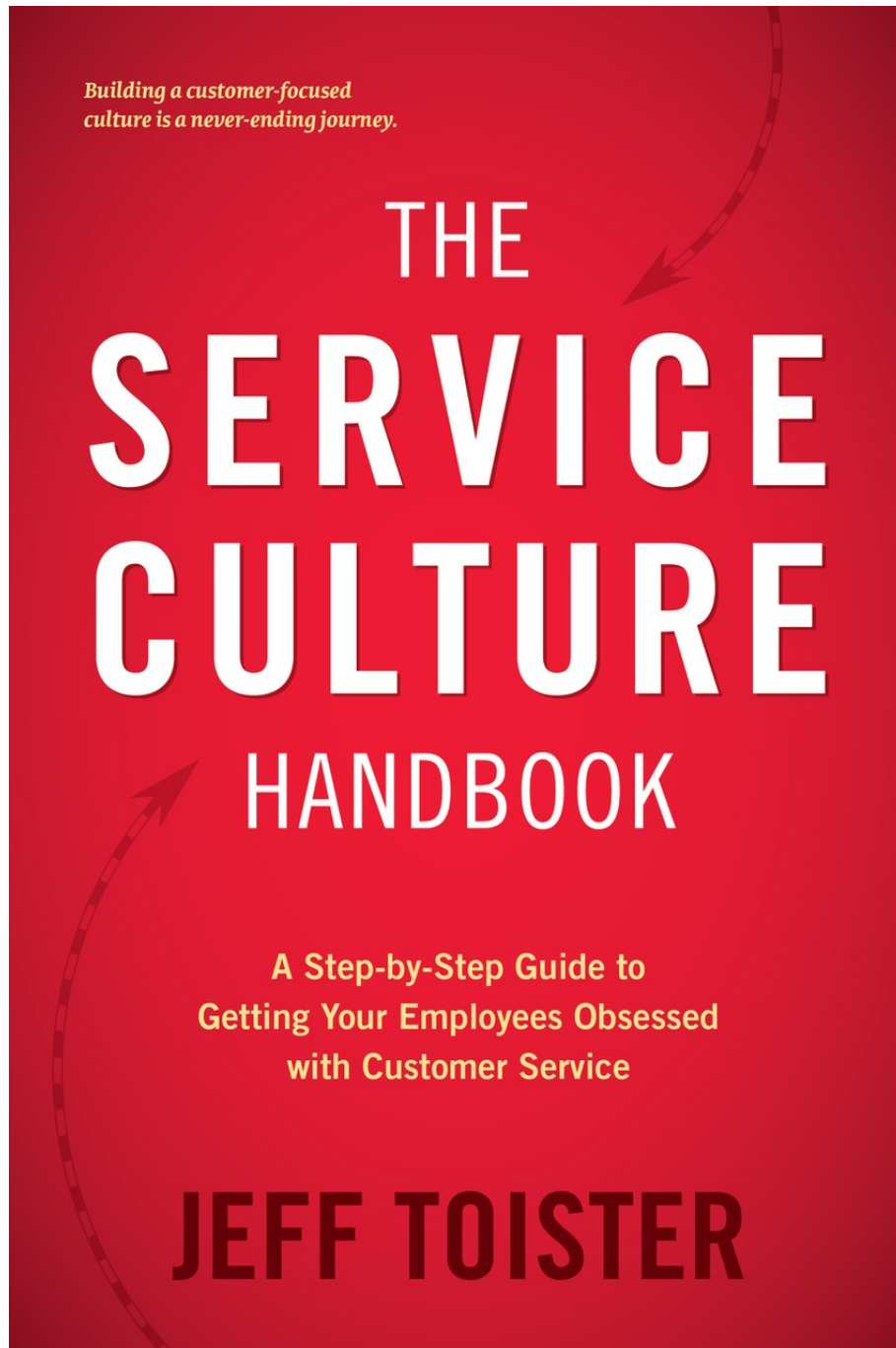


The Service Culture Handbook Toolkit



Tools to help implement concepts from *The Service Culture Handbook*.
To order a copy of the book, go to www.serviceculturebook.com

Table of Contents

| | |
|---|----|
| Introduction | 3 |
| Chapter 3: Customer Service Vision Meeting Agenda | 4 |
| Chapter 4: Communication Plan | 5 |
| Chapter 5: Alignment Assessment | 6 |
| Chapter 6: SMART Goal Worksheet | 7 |
| Chapter 7: Employee Turnover Calculator | 8 |
| Chapter 7: Ideal Candidate Profile | 9 |
| Chapter 8: Training Plan | 10 |
| Chapter 9: Empowerment Procedure | 11 |
| Chapter 12: Customer-Focused Activity Plan | 12 |



About Jeff Toister

Jeff Toister is the author of *The Service Culture Handbook: A Step-by-Step Guide to Getting Your Employees Obsessed With Service*. He's also appeared in many customer service training videos on Lynda.com, including *Leading a Customer-Centric Culture*.

His company, Toister Performance Solutions, Inc. helps customer service teams unlock their hidden potential.

The Service Culture Handbook is available in paperback and e-book formats from Amazon. Bulk discounts are available from **800-CEO-READ**. Please visit www.serviceculturebook.com for more purchasing options.

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Introduction

Imagine a workplace culture where employees were absolutely obsessed with customer service.

The Service Culture Handbook is a step-by-step guide to help you develop a customer-focused culture in your organization. Whether you're just beginning your journey, or have been working on culture for years, the guidebook will help you take the next step.

Of course, the whole point of a guidebook is to actually take the journey!

This toolkit can help you. It contains tools and worksheets referenced in *The Service Culture Handbook* that can enable you to implement key concepts.

Each worksheet corresponds to a different chapter in the book. The specific chapter is identified in the exercise title, such as “Chapter 3: Customer Service Vision Meeting Agenda.” You are encouraged to read the chapter prior to implementing that chapter’s exercise so you’ll have a foundational knowledge of the concept.

Additional Resources

These resources can help augment the exercises in this workbook.

Customer Service Tip of the Week

This reminder service delivers one customer service tip each week via email.

To sign-up, visit www.toistersolutions.com/tips

Inside Customer Service Blog

Jeff Toister’s blog delivers analysis, tips, and trends to help you unlock your customer service team’s hidden potential.

Visit the blog at www.insidecustomerservice.com

Customer Service Training Videos

Jeff Toister has partnered with the online video training portal Lynda.com to create engaging, high-quality customer service training videos.

To view the courses, visit: www.lynda.com/JeffToister

A Lynda.com subscription is required, but you can obtain a free 10-day trial by visiting www.lynda.com/trial/JeffToister

Chapter 3: Customer Service Vision Meeting Agenda

Overview

Delivering world-class customer service starts with clearly defining what outstanding service looks like. This meeting agenda can help you create that definition, commonly referred to as a Customer Service Vision.

Group Size: 7-10 participants

Preparation:

1. Gather input from key stakeholders such as employees, middle managers, executives. (See page 39 of *The Service Culture Handbook* for ideas.)
2. Identify existing relevant cultural artifacts such as a mission statement, vision statement, corporate values, customer service standards, etc.

Meeting Agenda

1. Clarify objectives

- Write a customer service vision statement (share examples)
- Identify illustrative examples of aligned behavior

2. Review data

- Review stakeholder input
- Review existing cultural artifacts (mission, vision, etc.)

3. Draft vision

- I. Split into two teams
- II. Each team drafts a vision statement (15 minutes)
- III. Share drafts and compare
- IV. Edit down to one draft
- V. Gut check with the group:
 - A. Is the customer service vision simple and easily understood?
 - B. Is it focused on customers?
 - C. Does it reflect both who we are now and who we aspire to be in the future?

4. Capture examples

- Identify illustrative stories that exemplify employees living the vision.

Follow-up

After the meeting, share the customer service vision with key stakeholders such as senior executives to make sure it resonates. You'll know you've succeeded if the reaction is immediately positive. Otherwise, you may need to slightly edit the statement.

Chapter 4: Communication Plan

Overview

The purpose of your communication plan is to ensure all employees can answer three questions about the customer service vision:

1. What is it?
2. What does it mean?
3. How do I personally contribute?

A good communication plan relies on a variety of methods to reinforce the same message multiple times.

Communication Plan

Complete each section below to form your plan. See page 57 in *The Service Culture Handbook* for an example.

Phase 1: Announcement: What is the vision?

Share the new customer service vision with employees via at least 2-3 methods. This ideally includes a statement or presentation from a senior leader such as the CEO.

Phase 2: Initial Training: What does it mean?

Help employees understand what the customer service vision means. This might consist of formal training classes, webinars, town-hall style meetings, or other events.

Phase 3: In-Depth Training: How do I personally contribute?

Help employees understand how their role aligns with the vision. Involve employees' direct supervisors since leaders will reinforce the vision going forward.

Chapter 5: Alignment Assessment

Overview

Use this assessment to determine how well key functions align with the customer service vision.

Our Customer Service Vision:

Alignment Check:

Please read the five statements below and rate your organization, department, location, or team on a scale of 1 (Almost Never) to 5 (Almost Always).

| Statement | Rating (1-5) |
|---|--------------|
| 1. We set business goals that represent progress toward our customer service vision. | |
| 2. We hire employees who are passionate about our customer service vision. | |
| 3. Employees are given sufficient training to teach them how to deliver service that fits our customer service vision. | |
| 4. Employees are empowered with the authority, resources, and work procedures they need to fulfill our customer service vision. | |
| 5. Organizational leaders reinforce our customer service vision with their employees on a daily basis. | |

Tally up your scores to get a total and check your alignment against the key below.

Alignment Key:

| Score | Result |
|------------|---|
| 20-25 | Alignment. Your organization is well positioned to deliver outstanding customer service. |
| 15-19 | Partial Alignment. Many aspects of the organization are aligned with your culture, but there are some areas for improvement. |
| 14 or less | Misalignment. Your organization's lack of alignment may be causing poor customer service. There are significant areas for improvement. |

Chapter 6: SMART Goal Worksheet

Overview

Goals are only effective if you can easily determine whether or not they have been accomplished. The best goals are SMART:

- S** = **Specific.** Clearly state the desired outcome.
- M** = **Measurable.** Provide a numerical target that clearly defines what results are necessary to achieve the goal.
- A** = **Attainable.** Goals must be realistic or people will become disengaged.
- R** = **Relevant.** Goals should be aligned throughout the organization and be relevant to the customer service vision.
- T** = **Time-Bound.** Goals should have a specific date or time frame.

SMART Example

Here is a real goal from a real company that is definitely not SMART:
Improve customer service.

Here is the same goal after it becomes SMART:
Average 4.5 out of 5 on our February customer service survey.

What are your goals?

1. _____
2. _____
3. _____

Implementing Goals

1. Share the goals with your team. Better yet, have your team help create the goals.
2. Publish the results so employees can follow the team's progress. Examples:
 - ✓ Posters or bulletin boards
 - ✓ Email updates
 - ✓ Handouts in team meetings
3. Review the goals periodically to stay on course.

Chapter 7: Employee Turnover Calculator

Overview

Use this worksheet to calculate the true cost of employee turnover per year.

| Labor Costs | A: Average Hours per Departure | B: Average Wage per Hour | C. Total Cost (A x B) |
|-------------------------------------|--------------------------------|--------------------------|-----------------------|
| Overtime to cover missing shifts | | | |
| Temporary employees | | | |
| Process separations (COBRA, etc.) | | | |
| Recruit candidates for openings | | | |
| Screen and interview candidates | | | |
| Check references, background, etc. | | | |
| Orientation and new hire training | | | |
| Total column C | -----> | | |
| Multiply by total departures | -----> | | |
| Total Labor Cost | -----> | | |

| Direct Costs | A: Average Cost per Departure | C. Total Cost (A x B) |
|---|-------------------------------|-----------------------|
| Help wanted advertising | | |
| Cost of search firm or contract recruiter | | |
| Drug testing and/or pre-hire assessments | | |
| Uniforms, tools, and equipment | | |
| Total column C | -----> | |
| Multiply by total departures | -----> | |
| Total Direct Cost | | |

Add your **Total Labor Cost** to your **Total Direct Cost** to get your **Total Cost of Turnover**:

Chapter 7: Ideal Candidate Profile

Overview

Use this worksheet to create a profile of the ideal candidate who will fit both your organization and the specific job.

Organizational Must-Haves: Cultural competencies an employee must have to be successful in this organization.

Organizational Nice-to-Haves: Cultural competencies an employee can develop over a reasonable period of time.

Job-Specific Must-Haves: An employee must have these competencies to be successful in his or her job.

Job-Specific Nice-to-Haves: Competencies that can be developed over a reasonable period of time.

Job Title: _____

| Organizational Competencies | Job-Specific Competencies |
|-----------------------------|---------------------------|
| <i>Must Have:</i> | <i>Must Have:</i> |
| <i>Nice-to-Have:</i> | <i>Nice-to-Have</i> |

Chapter 8: Training Plan

Overview

The book *Telling Ain't Training* by Harold D. Stolovitch and Erica J. Keeps provides an excellent blueprint for developing training. Below is the five step training model detailed by the authors. (You might consider buying the book as an additional reference.)

Training Plan

| Step | Action |
|----------------------|---|
| 1) Rationale | Identify the purpose of the training. |
| 2) Objectives | Share the objectives for the training. |
| 3) Activities | Conduct activities to help participants learn. Consider using a fundamental technique such as Tell, Show, Do: <ol style="list-style-type: none">1. Tell participants what they need to know.2. Show them an example.3. Have them do something to apply the knowledge or skill. |
| 4) Evaluation | Determine whether the objectives (step 2) have been met. |
| 5) Feedback | Confirm the objectives have been met and/or coach employees to improve. |

Chapter 9: Empowerment Procedure

Overview

Use this template to develop an employee empowerment procedure.

Procedure Title:

Give the procedure a name.

Purpose:

Describe when the procedure should be used.

Procedure:

List the specific steps that employees should take along with any guidelines for offering discounts or other compensation to customers.

Chapter 12: Customer-Focused Activity Plan

Overview

Use this worksheet to identify a series of activities that will continuously reinforce your customer-focused culture.

Annual Activities

Quarterly Activities

Monthly Activities

Weekly Activities

Daily Activities