

Excellence in Customer Service: Part 5

Driving Metrics With Process

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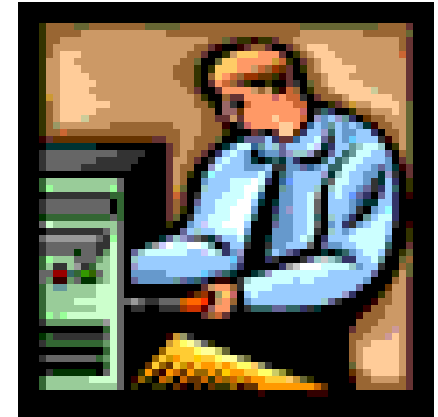
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Introduction

- **My background**

- 33 years in technical customer service
- 18 years with The Kemtah Group
- 15 years at Sandia National Labs
 - 13 years as supervisor



- **The world according to Tom**

- Consistency is the key to driving process
- Consistency is the key to driving performance
- Consistency is the key to creating a culture of quality
- Consistency!



Perceptions and Reality

- Perception

- My team has been characterized as having too much emphasis on metrics

- We *were* the highest performing team
 - We *must* drive metrics every day
 - We *surely* micromanage

- Reality (**mini- epiphany**)

- We rarely discuss metrics with our staff

- We *do* brag about our performance
 - We *do* applaud and recognize our high performers
 - Metrics *are* a part of our annual performance reviews

- Process and documentation are stressed every day!





Definitions to Ponder

Process

A systematic series of actions directed to some end.

Culture

A culture is a way of life of a group of people--the behaviors, beliefs, values, and symbols that they accept, generally without thinking about them, and that are passed along by communication and imitation from one generation to the next.



Today's Agenda

- A follow on to my 2011 NLIT Presentation – *Driving Performance and Quality on Your Team*
- The problem with metrics
- Create process to drive quality and *indirectly* drive metrics
- Using *macro*-management
- Creating a culture that embraces quality and performance
- Do you want to increase the performance and quality of your team?
 - If so you are at the right place!



The Problem with Metrics

- What you measure and reward is what you get!
 - Measure number of calls or tickets
 - You get high volumes of calls handled
 - Great customer service? – Maybe not
- The unintended consequences of driving metrics
 - Driving the wrong behavior
 - Poor customer service
 - Job dissatisfaction
 - Gaming the system
 - NASCAR race



The Great Truth

If employees perceive that metrics are being used inappropriately to constrain their behavior or that their behavior is being overly managed, they are quite likely to put all their energies and competencies into trying to beat the system, but if they perceive the system to be transparent and fair and that they are trusted to act in appropriate ways, then they will often make great efforts to deliver great customer service.

The problem with customer service metrics

Moira Clark and Philip Michell





What were our goals?

- **Improve metrics**
 - We were in the bottom half
- **Improve documentation**
 - We were unable to see our process in current documentation
- **Drive quality**
 - It was ok, but needed improvement
- **Create a culture?**
 - Wasn't on our radar
 - A great albeit unintended consequence





What We Did

- **Define our goals**
- **Discovery**
 - **Analyzing – Auditing**
 - **Live tickets then closed tickets**
- **Develop our processes, requirements, expectations**
- **Audit our work**
- **Remove loopholes – require honesty**
- **Reward and recognize**



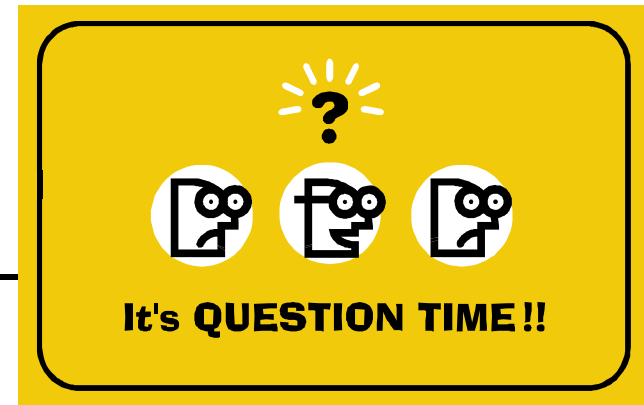
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Our Results

- **Developed top team in all metrics including customer surveys consistently for 10 years**
 - Went to another group and did it again
 - Added another group and did it again
- **Other benefits**
 - **Team Morale**
 - Honest hard work
 - Enhanced team performance in all areas
 - Team Pride
 - Staff known for performance – Career enhancing



Perceptions



- **Gaming the system?**
- **Driving metrics to detriment of customer satisfaction?**
- **Spending more time documenting then helping the customer?**
- **Micromanagement?**
 - **Maybe a little at first**
 - **Believed by people new to our team – Reality NO!**
- **Morale suffers?**
 - **Best staff tenure – we couldn't get rid of people**
 - **Consistent feedback of professional and fair management**



My Epiphanies



Process – Documentation - Audit

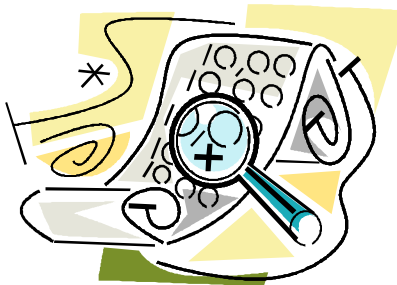
- **Process**

- **Give you a method to insure quality and consistency in handling and resolving tickets**

- **Define the problem**

- **Develop a process to solve the problem**

- **Require documentation**



- **Documentation**

- **Gives you a method to document your process**

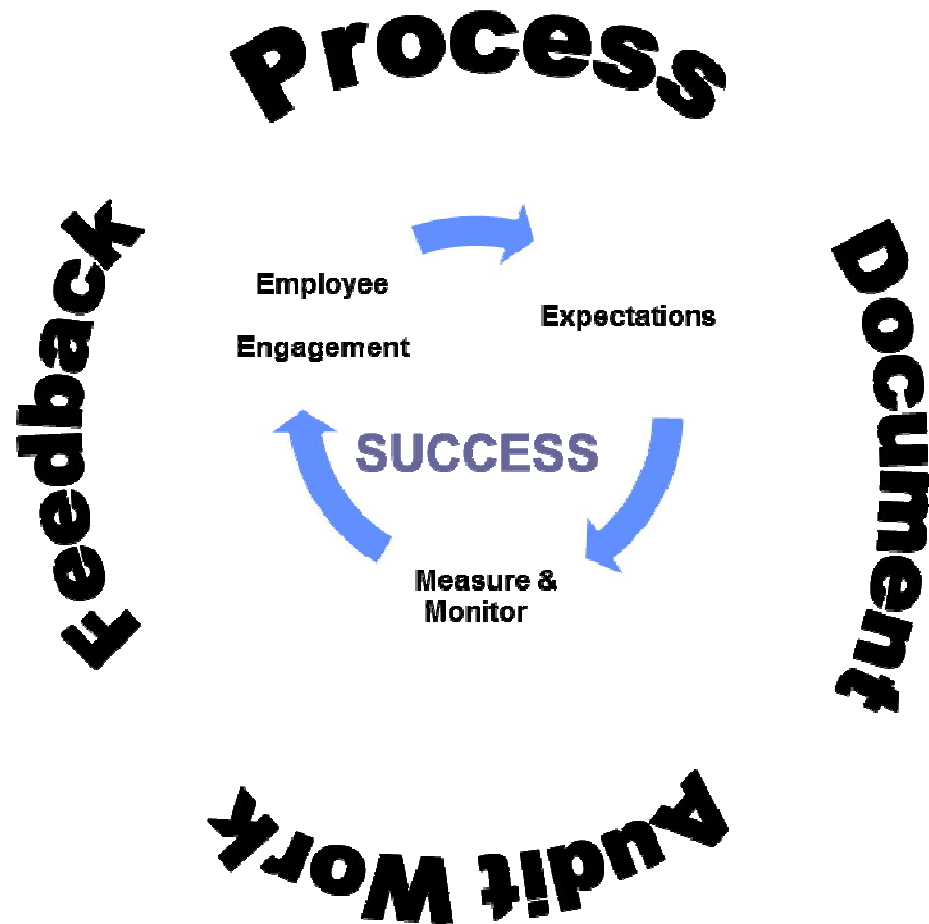
- **We require great documentation in our tickets**

- **Auditing**

- **Ensures your processes are followed and documented**



Quality Results





Our Solution

- **Create a set of expectations and standards for our documentation (Process)**
- **Cover areas that need improvement**
- **Audit, audit, audit**
 - **Ensure processes are followed**
 - **Ensure documentation is complete**
 - **Ensure honesty**
- **Documentation Requirements**



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Document

Results

- **Following the process and documenting your work gives you the metrics**
- **We don't micromanage**
 - **A management style whereby a manager closely observes or controls the work of subordinates or employees.**
- **We macro-manage**
 - **We set expectations**
 - **We define process**
 - **We require documentation**
 - **We turn them loose**
 - **We audit and measure their *results***



We Discover Something Wonderful!

- **We did it!**
 - Top metrics
 - Great documentation
- **But wait! There is more!**
 - Honest, quality work
 - Improved customer communication
 - Highest retention rates (staff tenure)
 - Consistent high morale
 - Culture of performance and quality



The Culture

- Macro-management
 - We don't watch what you are doing
 - We use a holistic view
 - We measure and provide feedback after the fact
 - Our staff enthusiastically agrees!
 - Performance issues are addressed when needed
- Honesty and Integrity in our work
 - Pride and accomplishment are true rewards
 - Metrics are earned honestly
- Going forward
 - New team
 - Push back from some new members





Questions?

