CREATING A CUSTOMER-DRIVEN CULTURE

HITTING THE MARK FALL CONFERENCE

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Change & Transformation in Health Care

- What types of changes is your agency/organization experiencing that are most directly affecting the role of customers/clients/patients?
- What is most challenging when it comes to making your agency/organization more “customer-driven”?

Have a scribe at your table capture responses and reporter ready to share with the group
Leadership: Pulling the Future into the Present

Level of Emphasis

Present  Future

Leading

Managing

Objectives/Agenda

- Identify the characteristics of high performing customer-driven organizations
- Learn a highly applicable framework for transforming to a more customer-driven culture
- Begin (continue) your leading change efforts through a set of application exercises that you can continue with your team

Southwest Airlines

The mission of Southwest Airlines is dedication to the highest quality of Customer Service delivered with a sense of warmth, friendliness, individual pride, and Company Spirit.

“Our People are our single greatest strength and most enduring long-term competitive advantage.”
- Gary Kelly, CEO Southwest Airlines
Customer-Driven Organizations: Identifying Characteristics

- Customer service core to their identity/mission
- Approach to customer service developed from within
- Have engaged, proactive and committed teams that deliver excellent service
- Leaders empower, promote change and adaptability and lead with humility
Three Surprises About Change

- What is seen as resistance, is often a lack of clarity (direct the rider)
- Change requires appealing to both minds AND hearts (motivate the elephant)
- Changing the situation can be more powerful than changing the person (shape the path)

Direct the Rider
100,000 Lives Campaign

What is a potential “destination post-card” for excellence in service to patients/clients/customers for your team?

Share with a partner and give each other feedback
Direct The Rider

- Find the Bright Spots
  - What are the exceptions to the problem you are trying to change?
  - Study them
  - Scale the successes
  - Place to jump start change

- Challenge: How to reduce turnover among nurses?
- Bright Spot: Identify the exceptional nurses who were staying – what is unique about them?
  - Insight: Professional identity is key to longevity
  - Leverage the Bright Spot
    - New recruitment and orientation programs
    - Mentorship programs
    - Recognition programs

Lovelace Health System
The “Miracle” and “Exception” Questions

Imagine that you arrive to work tomorrow and find clear evidence of your “destination post-card” starting to be realized....

- What would be the first visible sign?
- When was the last time that you saw evidence of that?
Bright Spots: Application

• Share your identified service “bright spot” with your team. Invite them to help sharpen the description and understanding of the bright spot.

• Ask the team to identify other “bright spots”
  ▪ What 2-3 “bright spots” seem to offer the best opportunities to scale (i.e., you can learn something from them and replicate them)?
  ▪ These as potential places to initiate customer service improvements

Direct The Rider

- Script the Critical Moves
  - What are the key behaviors for achieving service excellence?
  - Minimize choices (Note: not autonomy)
Ritz-Carton’s Three Critical Service Steps

1. Provide a warm and sincere greeting
2. Anticipate and strive to fulfill each guest’s needs
3. Provide guests with a fond farewell (sincere good-bye and use the guest’s name)

Critical Moves: Application

- With your team, identify one critical area that significantly impacts customer service.
- What are the key behaviors for achieving excellent service in this area?
- What are 3-5 steps that can be identified that if followed would significantly improve the quality and consistency of service? (Jump Starts)
- Identify longer-term Critical Moves necessary for realizing your Destination Postcard
  - Mid-range (next 12 months)
  - Long-term (next 2+ years)
Motivate the Elephant

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- Traditional approach
  - Analyze, think, change
- Find the Feeling
  - Defines a purpose that resonates emotionally
  - See, FEEL, Change
Power of Customers to Motivate

- Impact
- Appreciation
- Empathy


Using Customers to Engage the Team

- Set up events and meetings where patients/clients/customers can share their experiences
- Seek out new stories (e.g., RCs’ “wow” stories)
- Find internal customers
- Turn staff/team into customers
- Recognize high-impact contributions through peer recognition

Motivate the Elephant

- Grow Your People
  - Make the change around identity
  - Build a growth (learning) mindset
Shrink the Change

- Motivates by making goals seem more achievable
- Start small and look for quick wins
- Show and remind of progress

Grow Your People & Shrink the Change: Application

- What is an identity that your team aspires to that can help support a customer-driven culture? How might you build this identity?

- Identify one small win (and immediate actions necessary to achieve it) that could be taken toward your change. Think in terms of:
  - Can be used to point to initial progress
  - Will help build momentum
Shape the Path

- Tweak the environment
- Build good habits
- Rally the herd
Shaping the Path: Application

- Identify potential ways you might be able to support the change that you have identified by (one or more of the following):
  - Make small changes to the work environment (e.g., rearrange waiting room space; flow of patients/clients and staff)
  - Build good habits that reinforce desired behaviors (e.g., check lists, reporting tools)
  - Rally the herd (e.g., involve key opinion leaders; start groups (e.g., “lunch and learns”) where supporters of the change can meet)

Directing the Rider

- **Bright spots**: Drawing attention to bright spots brings hope and optimism
- **Point to the Destination**: Giving a clear and engaging goal inspires effort
- **Script the Critical Moves**: Clarifying what the team needs to focus on and prioritize provides the team clarity
Motivating the Elephant

**Find the Feeling:** Defines a purpose that resonates emotionally

**Shrink the Change:** Smaller, achievable goals with visible results builds confidence in the team

**Grow Your People:** Building a team identity and a mastery-mindset motivates the team to look at change as an exciting opportunity

Shaping the Path

**Tweaking the Environment:** Small changes to what your team experiences can produce big changes in behavior

**Build and Reinforce Habits:** Good habits that are reinforced make the right behaviors routine

**Rally the Herd:** Attitudes and behavior are contagious—the more others support the change, the more likely dissenters are to join in
Thank You!

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References/Resources

- Escape Fire (movie and related change-related resources) http://www.escapefiremovie.com/