

## RELATED RESOURCE – “BRING REAL MEANING TO CUSTOMER SERVICE”

### HOW TO DESIGN YOUR SERVICE EVALUATION PROCESS

“Each moment of truth has the potential to be neutral, negative, or positively memorable!”

#### Feedback:

Customer feedback is useful only once it is processed, usually through quantitative means. Analysis of feedback allows management to focus on general trends and specific goals. Agency leadership must target service and product areas for analysis (such as claim filing, policy updates or information requests), then identify the cycle a customer goes through when receiving that service or acquiring that product.

Once you understand the cycle, ask a series of questions to determine the quality of the experience at each step in the cycle. Establish a rating scale to monitor quality over time. An open-ended question involving customer suggestions for improvement also might be added.

Remember, a broad-brush survey about overall customer satisfaction won't help your agency fix the real problems.

Don't try to evaluate everything at once. Choose your most important areas, as defined by profit or quantity of experiences or importance to your most valued clients, etc. Focus on two or three at first. Identify the clients to be surveyed. Define success before getting results. Discover the client's expectations. If you are not meeting expectations, you may have a perception problem instead of a performance problem.

Make responding easy. Use quick phone surveys or postage-paid, preaddressed reply cards. Keep the survey short and as specific to the area you are evaluating as possible.

#### Analysis and Response:

Leadership, with the integral assistance of the workforce, must identify worker tasks at each level of the cycle in each different area to analyze. When the survey performance numbers come in, they will be mapped against those worker tasks. Low satisfaction ratings at one step in the cycle will equate with sub-standard performance on a specific, identified worker task. There will be little ambiguity about what aspect of service or what type of product needs to be adjusted since it will have already been agreed upon prior to the administering of the survey.

Use a quality database and a competent analyst to effectively quantify and manipulate the response data. After the numbers have been mapped against the cycle steps and tasks, make adjustments to the customer service process. More data should be gathered after the adjustments to ensure that ratings improve and that the right conclusions were drawn from the previous survey.

