

# AMBASSADOR JOURNEY

TO A POSITIVE CUSTOMER EXPERIENCE



**POSITIVE = POSITIVE**  
**APPROACH = EXPERIENCE**

# CULTURE



## MISSION

Provide exceptional customer service.

## VISION

The audacious vision is that all of our customers will have a positive experience.

## COMMITMENT

We commit to using a **positive approach** to provide customers with a **positive experience**.

## METHOD

We use the eight-step Journey to a Positive Experience. Each step is outlined in the following pages.

## SLOGAN

Our journey to a positive experience begins with you.

**POSITIVE APPROACH = POSITIVE EXPERIENCE**



# STEP 1: **COMMIT TO HAVE HEART**

# HEART



## Step 1 - Commit to have HEART

*Are we committed to defining and living our brand promise to customers?*

**What:** To achieve a positive customer experience, we will use a positive approach.

**Why:** To reinforce our commitment to providing exceptional customer service.

**How:** A positive approach means serving with HEART:

- Helpfulness – Going out of our way to find answers.
- Expertise - Being knowledgeable.
- Attentiveness - Being ready to meet your needs.
- Respect - Treating everyone with dignity and courtesy.
- Timeliness - Being efficient with your time.
  
- Build your Team HEART.

**Resources:**

- Customer Service InSite page for all team members.
- Ambassador Site.
- Communicate the HEART message and ask all department team members pledge to treat customers with HEART.
- Pledge poster for team members to display.
- Additional promotion materials will be available, such as posters, wallet cards, buttons.
- HEART message will be reinforced with a variety of Countywide communications.



# STEP 2: KNOW OUR CUSTOMERS

# CUSTOMERS



## Step 2 - Know Our Customers

*Do we know our customers, what they need, where we serve them and how to connect them to other services?*

**What:** Our customers are as varied as the programs and services we provide and as diverse as the region we support. Our customers are all those we interact with or affect, including residents, visitors, colleagues, volunteers, businesses, other agencies, plants, animals, and the natural environment we share.

**Why:** To better understand our customers' motivations, needs, entry points, and service-delivery preferences, so that we can best position ourselves to improve their overall customer experience.

**How:** Identify who they are (residents, colleagues, stakeholders, visitors, etc.). Understand our customers may differ at the department, division, and unit levels. What does exceptional customer service mean to our customers?

Identify what they need. Are we anticipating their needs? What obstacles do they face? Are we solving *their* problems? Will our approach achieve their desired results? Are we asking the right questions? Are we presenting options and being solution-oriented? When answering these, always consider customers' language, abilities, diversity (generational, cultural, gender, geographic, etc.).

Identify where and how we serve them. Is it in person (office, home, field, etc.), online, via phone, through mail or through the environment (roads, parks, air, water, etc.)? Is our website customer-focused?

Identify how we connect them to other related services, including services outside your division or even non-County agencies (partners; contractors; state, federal and other local governments, etc.).

### Resources:

- Know Our Customers Discussion Guide
- Team members at all levels
- Managers
- Fellow ambassadors
- Departmental HR Representatives
- Group HR Directors



# STEP 3: **KNOW OURSELVES**

# OURSELVES



## Step 3 - Know Ourselves

*How well are we using the positive approach (HEART) to deliver a positive experience?*

**What:** Assess ourselves and compare it with what customers say about their experiences.

**Why:** To understand our strengths and weaknesses so we can leverage strengths and shore up any weak spots.

**How:**

- Identify where we think we are compared to where our customers say we are.
- Do we engage our customers and team members in how we can improve our services and business processes?
- How do we get feedback from our customers? If we already have customer service surveys, what do they say? If we don't already have one, a carefully prepared survey can be a valuable tool.
- Do we conduct focus groups with customers, stakeholders and team members?
- Is there any other way in which we talk to our customers and capture their feedback about their experience?
- Complete a customer service assessment and compare it with what customers say about their experience. Now take a step back, and within divisions/departments ask ourselves where the gaps are and gather information. What are the strengths, opportunities and challenges? Where are we, what are we good at, what aren't we doing so well at, do we have the skills, do we need additional training? Are there areas for improvement that are symptoms of larger issues? What was the root cause of the challenges and how will we address/fix it?

**Resources:**

- Know Ourselves Discussion Guide
- Self-Assessment Survey for HEART
- Departmental Assessment Survey for HEART
- Customer Experience Survey
- Convene focus groups
- Departmental HR Representatives
- Group HR Directors



# STEP 4: **SET GOALS**

# GOALS



## Step 4 - Set Goals

*What results are we trying to achieve for our customers?*

**What:** Using the results of the assessments (Steps 2 and 3), establish short-term (3 months), mid-term (6-9 months), long-term (12 months) and audacious (up to 5 years) goals. See examples under Resources.

**Why:** To challenge and stretch ourselves in providing exceptional customer service.

**How:** Set goals for all aspects of the customer experience.

Consider:

- Our training needs (technical and soft skills).
- Areas in need of process improvements.
- Our communications, both internal (within department and County) and external (with customers).
- How can technology improve service delivery?
- Do we need to improve skills for any aspect of HEART?

### Resources:

- Set Goals & Measure Success Worksheet
- Customer Experience Survey
- Articles and websites on best practices and goal-setting
- Departmental HR Representatives
- Group HR Directors

Examples of goals:

Short-term:

- Determine our baseline and set a customer service satisfaction rating.
- Establish a feedback loop.
- All team members view HEART video.

Mid-term:

- All team members take customer service training.
- Redesigning our website from the customer perspective.

Long-term:

- Reduce the time it takes to deliver a service to our customers, while increasing the quality of that service.

Audacious: All of our customers have a positive experience.

**POSITIVE APPROACH = POSITIVE EXPERIENCE**



# STEP 5: **DEVELOP SKILLS**

# SKILLS



## Step 5 - Develop Skills

*How are we making sure we have the skills to provide our customers with a positive experience?*

**What:** Mentor and coach our team members while developing their HEART skills through training and resources.

**Why:** To ensure consistency in how we treat all customers across all departments: one County, one positive experience.

**How:**

- Define the necessary skills such as: technical, strategic, process improvement, customer focus, measurement, and problem-solving.
- Develop a skill training program/plan for our team members in coordination with our HR colleagues.
- View and promote the customer service classes on LMS (see Resources below).
- Learn how to perform root cause analysis and business process improvements (see Resources in Step 7 Improve and Collaborate).
- Consider job aids for team members.
- Consider role-playing actual scenarios to teach the skills and lessons learned.
- Look to external resources to keep abreast of current customer service best practices: online, books, conferences, associations, etc. (e.g., GovLoop, DigitalGov.gov, recognized customer service experts).
- Lead by example. Take the time to coach and mentor team members. This can produce even more value than training.
- Learn from others and their successes (see more under Step 7 Improve and Collaborate).

**Resources:**

- Customer Service Classes on LMS:
  - Customer Service Excellence
  - Customer Service Excellence for Supervisors
  - Breaking Free from Burnout
  - Serving Diverse Customers
  - Working with Difficult Customers
  - Communicating Effectively with your Customers
  - Creating a Positive Experience for our Customers (Online)
- Business process improvement methodologies
- Customer Experience Reading List
- Customer Experience Conference (Disney's Be Our Guest)
- Departmental HR Representatives
- Group HR Directors



## STEP 6: **MEASURE SUCCESS**

# MEASURE



## Step 6 - Measuring Success

*How will we know if we are providing our customers with a positive experience?*

**What:** Track progress toward our goals of delivering a positive experience for our customers.

**Why:** To hold ourselves accountable to produce desired results.

**How:** Ensure we monitor goals to improve the customer experience. To do this, each department should engage in a meaningful discussion about how it will measure success, establish the measurements, as well as document the progress. Possible discussion questions include:

- Do we have performance measures that are Service Quality and Outcome oriented?
- Have we established milestones and checkpoint mechanisms for short, mid and long-term goals across unit, division and department?
- How will we review and analyze data provided by the customer feedback mechanisms (surveys, comments, etc.) about our customers' experiences (whether positive or negative)?
- How will we capture and respond to unstructured feedback (e.g. social media, letter to Board of Supervisors, email, phone call)?
- Benchmarking – how does our customer service compare to others?

**Resources:**

- Set Goals & Measure Success Worksheet to capture results
- [Monitoring and control tools](#) in the General Management System
- Departmental HR Representatives
- Group HR Directors



# STEP 7: IMPROVE & COLLABORATE

# IMPROVE & COLLABORATE



## Step 7 - Improve & Collaborate

*How do we learn from each other to better serve our customers?*

**What:** Learn from feedback and results, network with colleagues on successes and challenges, improve connections to other services, and re-imagine how we meet our customers' needs.

**Why:** To achieve our goal of continuously improving our approach to providing a positive customer service experience.

**How:**

- Allow time for sharing customer service stories (successes, challenges and lessons learned) at department and division meetings.
- Share experiences through various channels: customer service ambassador meetings, Collaboration SharePoint site for ambassadors, InSite stories.
- Take action and reach out to your fellow departments to improve handoffs for services.
- Share customer feedback received about other departments and work with them to address customer issues.
- Talk to our customers. Work collaboratively with them through community meetings, focus groups, customer summits, etc.
- Identify what follow-up with customers is needed.
- Implement process improvements into our business to make lasting improvements to service delivery.
- Think outside the box and try different approaches. Continue to learn from other agencies and the private sector (see external resources by visiting the Customer Service website regularly).

**Resources:**

- Customer Experience Ambassador Summit meetings
- Customer Service website
- County Communications Office for InSite stories
- Business process improvement methodologies
- Departmental HR Representatives
- Group HR Directors



STEP 8:  
**RECOGNITION**

# RECOGNITION



## Step 8 - Recognition

*Are we encouraging our employees to deliver a positive experience?*

**What:** Recognize employees for providing a positive experience.

**Why:** To commend team members who demonstrate the principles of a positive approach, leading to a positive experience for our customers and as a motivation to achieve excellence in customer service.

**How:** Departments may recognize team members in a variety of ways. Consider:

- How will we identify team members who provide excellent customer service – including how we serve each other?
- How will we recognize team members who meaningfully contribute (above and beyond performance) to service delivery improvements?
- How do we ensure recognition is timely?
- How do we ensure recognition is meaningful to our team members (what motivates them)?
- How can our customers recognize employees?
- How do we recognize our customers?

**Resources:**

- Recognition Discussion Guide
- Ambassador Site
  - Thank You Notes
  - Certificates of Appreciation
  - On the Spot card
- Departmental HR Representatives
- Group HR Directors

"A customer is the most important visitor on our premises, he is not dependent on us. We are dependent on him. He is not an interruption to our work. He is the purpose of it. He is not an outsider in our business. He is part of it. We are not doing him a favor by serving him. He is doing us a favor by giving us an opportunity to do so."

– Gandhi

"We see our customers as invited guests to a party, and we are the hosts. It's our job every day to make every important aspect of the customer experience a little bit better"

– Jeff Bezos, CEO, Amazon.com



**POSITIVE = POSITIVE  
APPROACH = EXPERIENCE**