Customer Focus Workshop

Learning Objectives

After completion of this workshop, participants will be able to:

- Define customer focus
- Identify their customers
- Use the CTQ tree to help determine their customers' wants and needs
- List different approaches to customer engagement and measurement
- Plan a strategy for collecting customer information and feedback

What is Customer Focus?

Customer focus encompasses the ways in which a public health agency or program:

- Listens to the voice of its customers
- Builds customer relationships
- Determines customers' level of satisfaction
- Uses customer information and feedback to identify and act on opportunities for improvement

Customer focus is not limited to assessing customer satisfaction. In fact, the following are different components that make up a customer-focused culture:

- Customer-oriented structures guide work (e.g. customer-related performance measures)
- Leadership commitment to customers (e.g. leadership encourages customer engagement)
- Customer-focused systems and processes (e.g. clear customer complaint management process)
- Customers are understood (e.g. customer groups have been identified)
- Customers are engaged (e.g. customer feedback is proactively sought)
- Customer information and feedback is shared and used (e.g. customer feedback is regularly analyzed)

Why is Customer Focus Important for us?

- Less staff – Operating on tighter budgets
- Losing knowledge – experience and knowledgeable staff are retiring

- Pressure from decision-makers and citizens – provide more responsive service and be pro-active to improve services for customers
- Customers' expectations rise – want faster, more accurate and consistent answers from government
- For government, customers cannot "go somewhere else" – stakes are higher for customers because they will be more persistent, more vocal/aggressive, when they are not getting the services they need/want. Staff and supervisors will spend more time in dealing with these problems.
- The political fallout of customers not feeling they are treated fairly with respect – customers are now using public platforms to complain and if they are successfully heard, there is a large amount of time for supervisors/staff to respond to questions
- Contribute to a better understanding of the effectiveness and efficiency of services
- Enhances the ability to understand and meet customer needs
- Contributes to a culture of quality by fulfilling a guiding principle of quality improvement
- Contributes to the ability to meet the Public Health Accreditation Board's Measure 9.1.4 A: "Implemented systematic process for assessing customer satisfaction with health department services" (Source: PHAB Standards & Measures, Version 1.5)

Public Health Accreditation and Customer Focus

PHAB measure 9.1.4 A (version 1.5): Implement a systematic process for assessing customer satisfaction with health department services.

Purpose: The purpose is to assess the health department's process for measuring the quality of customer relationships and service.

Significance: Customer focus is a key part of an organization's performance management system. To evaluate the effectiveness and efficiency of the health department's work, it is essential to identify customers and stakeholders, both internal and external. A health department also needs a process to capture and analyze customer feedback in order to address the expectations of various public health customers.

Identifying Customers

1. Customers: Direct recipients or users of the products or services you provide.
   A. Internal or external – depends on the product or service.
2. Stakeholders: Indirectly benefit from your products and services.
   A. Care about and have an interest in your products and services but do not directly use them.

Examples:

Product, service, activity	Customers	Stakeholders
Give immunizations	Person receiving the immunization	Family members, community members

Process timecards	Employee	Employer
WIC certification appointment	Person receiving WIC certification	Family members
Healthy home assessment		

Customer Identification Group Work

Gather into your program teams. Use the flip chart and markers to brainstorm the following (start with #1, when finished, move on to #2, etc.):

1. Main services/products – what services/products does your program provide? What is it you do?
2. Who is the direct recipient(s) of the service/product? This is the customer(s).
3. (optional) Who is interested in this product/service but does not directly receive it? These are the stakeholders.
4. Prioritize where to focus your customer focus efforts. Pick one service and one customer to focus on the rest of today. See prioritization criteria below.

<u>Criteria to Consider when Prioritizing Customer Focus Efforts</u>

Largest # of people served

Largest service/product, in terms of budget or staff

Clear opportunities for improvement (e.g. services/products with known complaints or issues)

Highest strategic priority

High profile services/products or those with known controversy

Customer Needs and Wants

1. Needs
   A. Needs establish the relationship between you and the customer, i.e. the customer comes to you because they need ________.
2. Wants (requirements, key drivers, expectations, quality drivers)
   A. Requirements are characteristics or factors that determine whether or not the customer leaves satisfied or understands what they need to do to get what they need. Also known as "key drivers" of customer satisfaction.

King County Drivers of Satisfaction List

End result - service/product quality	Timeliness - speed of service/product delivery	Information - quality and completeness of information	Staff competence - professionalism, expertise
Reliability - performance of service, products, staff	Staff attitude - courtesy, politeness, friendliness	Fairness - honesty, justice, and fairness of the system	Access - availability of staff, services, products
Look and feel - appearance, comfort of environment, facilities, staff	Safety and security - customer safety and confidentiality	Convenience - ease of obtaining product/service	Value and cost - value of service/product compared to cost

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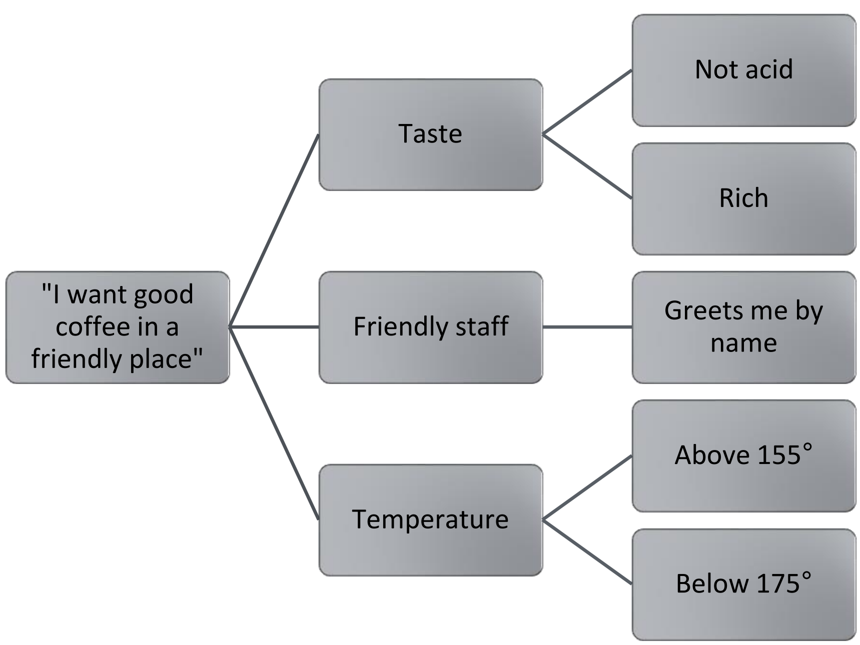
Critical to Quality (CTQ) Tree Tool

A CTQ tree helps increase the understanding of what drives quality in the eyes of the customers. It is used to translate customer wants into specific, actionable, measurable performance requirements/measures.

CTQ tree example:



Customer Needs and Wants Group Work

With your program team, complete a CTQ tree. Using the service/product and customer prioritized previously, pick one key need of that customer group to start. Use the worksheet and then put your final CTQ tree on the flip chart.

Collecting Customer Information and Feedback

Needs: What is it the customer absolutely needs from this service/product to be satisfied or understand what they need to do to get what they need? Why are they coming to/contacting you? What do they need?

Wants/Requirements/Drivers: What characteristics or factors does your customer use to determine the quality of the service/product?

Performance requirements: How will you know if you are meeting the customer wants/requirements? What information would tell you whether or not you are meeting your customer wants/requirements?

The important thing is to collect customer information and feedback that you will actually use. If you will not use it, do not collect it.

The most common methods of collecting customer information and feedback include:

- Surveys
- Focus groups
- Interviews
- Comment/complaint cards.

Each has its own advantages and disadvantages. We will focus on surveys, but note that focus groups are great to use at the beginning (to gather information about wants/key drivers) and end (to help interpret results) of data collection.

Ideally, you will gather information about customers' wants/key drivers prior to survey development. If you cannot do this, include questions asking customers to rate satisfaction with and importance of a set of possible wants/key drivers. "Importance" questions help get at customer wants.

Key Points about Customer Surveys

- As short as possible
- Clear and without jargon
- Easy to answer
- Anonymous
- Completed soon after service/product delivery
- Tailored to each programs services, needs, etc.

Questions to Consider Including

- Overall satisfaction
- Questions related to key drivers
- Customer demographics (at end of survey: age, gender, race/ethnicity, income, etc.)
- Open-ended feedback question(s)
- Questions about service delivery (how services accessed, day/time services accessed, etc.)

Also,

- Limit each question to one idea or concept
- Include time periods ("within the last year" or "last visit")
- Use 5-point Likert scales with a "not applicable" option

Collecting Customer Information and Feedback Group Work

With your program team, complete the collecting customer information and feedback planning worksheet.

Group Sharing

Please share the following with the large group:

- Service/product and customer you are focusing on
- CTQ tree
- How you hope to use the customer information and feedback you will be collecting

What next?