

October 2010

Community Literacy of Ontario Focus on Customer Service

Community Literacy of
Ontario

80 Bradford Street
Suite 508

Barrie, Ontario
L4N 6S7

Tel: 705-733-2312
Fax: 705-733-6197

www.nald.ca/clo

clo@bellnet.ca

CLO Presents: *Capacity Plus!*

During the past year, CLO hosted a project called “*Capacity Institute and Resource Guide*”. This project focused on organizational capacity which is a key need for many community-based literacy agencies across the province.



As part of this project, CLO hosted an Organizational Capacity Institute in Kingston in November 2009. CLO also researched organizational capacity needs and promising practices across the province. Research included conducting on-site visits, hosting focus groups, holding telephone interviews, researching print and online sources and more. We then researched and wrote *Capacity Plus: Organizational Capacity Resource Guide for Ontario's Community Literacy Agencies*.

Capacity Plus was released in August 2010 and has been circulated in hard-copy format to CLO's member agencies. If you haven't received a copy, it is also available online at CLO's website (www.nald.ca/clo/) under “Publications”. *Capacity Plus* has been an instant “best seller” with an incredible **9,955 copies** being downloaded from our website between August 11 and 31, 2010!

Capacity Plus looks at four key areas of organizational capacity: financial management, human resources management, risk management, and customer service. This newsletter will focus on the customer service aspect of organizational capacity.

It should not come as a surprise that CLO's research showed that community-based literacy agencies excel at customer service, and that customer service is a cornerstone of the work that we do. In fact, good customer service seems to be second nature to many literacy practitioners — it is simply who we are and what we do. However, because it is second nature, it can sometimes be difficult for those same practitioners to articulate how the good work they are doing is in fact good customer service. Defining these skills and the steps we take to ensure our customers are happy and satisfied is an area of organizational capacity that we need to enhance to help ensure that potential learners, volunteers, funders and the community at large are aware of the great work that we do!

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CLO's Customer Service Quality Statements

Research conducted during the past year revealed that while Ontario's community-based literacy agencies are excellent at providing outstanding customer service, sometimes they do not have a satisfactory way to clearly track and demonstrate the good work that they do. During site visits, in focus groups, in interviews and on telephone calls, CLO staff clearly heard that practitioners are looking for ways to become more deliberate and focused in their customer service efforts so that they can provide even better service and also so that they can better document and highlight their best practices.



To respond to this need and to help our members better articulate the work that they do, CLO staff created ten customer service quality statements. These statements were reviewed by the project Advisory Committee and the CLO Board of Directors. CLO hopes that the quality statements will provide both a tracking tool for agencies to use when documenting their customer service efforts, as well as a way for agencies to showcase the excellent work that they are doing in this important area of organizational capacity. Please note that adopting any or all of these customer service practices is completely voluntary!

#1. Our literacy agency fosters a culture of customer service

Agencies can demonstrate this quality by ensuring that all customers are treated with respect and courtesy, by creating a welcoming environment, and by providing services in a timely manner. Agencies can also foster a culture of customer service by ensuring that all staff and volunteers are provided with information, resources and/or training about customer service as appropriate.

#2. Our literacy agency provides a learner-centred, quality learning environment

Agencies can demonstrate this quality by providing learner-centred programming, by incorporating adult learning principles and by ensuring that quality instruction is offered by skilled, trained staff and tutors. Further, ensure that this instruction is offered in a variety of formats to meet individual needs and goals. Agencies can also seek input from learners and other customers about how programming is delivered and how to address any barriers to learning that may exist. Learning environments should be free from risk, harm and harassment for everyone, i.e., students, staff and volunteers. Information and resources about safety and security, including violence and harassment policies, can be found in the Human Resources Management chapter of *Capacity Plus*.

#3: Our literacy agency provides initial and ongoing support to learners

Agencies can demonstrate this quality through the initial orientation process by ensuring that learners are provided with clear information about the program, its policies and rules, expectations, and steps needed to achieve their goals. Additionally, agencies can provide information about and referrals to other services that learners might be interested in, in addition to providing support to help learners access those services. Agencies should meet with learners regularly to review progress and update training plans. Student achievement should be celebrated using appropriate methods.

#4: Our agency honours the privacy of our customers

Agencies can demonstrate this quality by having strict policies and procedures related to confidentiality and by honouring those policies and procedures at all times. Policies and procedures related to confidentiality should explain who is affected (staff, volunteers, learners, donors, etc.), what information is being protected and how, what information will be used for, and who will have access to it (designated staff). These policies and procedures should meet the requirements of the Personal Information Protection and Electronic Documents Act (PIPEDA). Sample privacy and confidentiality policies can be found in the Risk Management chapter of *Capacity Plus*.

#5: Our literacy agency values respect, inclusion and accessibility

Agencies can demonstrate this quality by respecting and valuing diversity in terms of age, gender, race, ethnicity, culture, physical and intellectual ability, religion, beliefs, sexual orientation and educational background. Agencies should also strive to accommodate people with special needs and disabilities, whenever possible. All agency practices and procedures should follow the Canadian Human Rights Act and any other relevant legislation.

#6: Our literacy agency knows who its key customers are and actively solicits its feedback

Agencies can demonstrate this quality by having a process in place to help identify their key customers and to determine the needs of these key customers. Agencies should also promote a culture of openness and transparency where all customers — primary and secondary — have the opportunity to provide feedback. Agencies should follow up on any issues, questions, concerns, etc. raised by customers through formal and informal feedback.

#7: Our literacy agency seeks to regularly improve our customer service practices

Agencies can demonstrate this quality by regularly assessing their customer service practices and improving them as needed (be sure to include this in your annual CIPMS plan: tracking and reviewing feedback and making changes as appropriate fits perfectly into an action plan). Agencies can also seek feedback from people and organizations who are not currently customers but who may access services in the future. For example, finding out why a potential referral organization is not currently referring its clients may help you establish a new partnership or may identify possible areas that need change or improvement.

#8: Our literacy agency has a formal customer complaint and resolution process

Agencies can demonstrate this quality by establishing policies and procedures regarding customer complaints and by ensuring that those policies and procedures are followed. See page 5 for more information.

#9: Our literacy agency is actively involved in our community to ensure effective referrals and service coordination

Agencies can demonstrate this quality by supporting learners who wish to access and participate in other training, employment and/or community services. To help do this, agencies should regularly network with a variety of community partners and stay abreast of what services and programs are offered in the community. Agencies should also actively follow up on any referrals that they make, to ensure that learner needs were met.

#10: Our literacy agency has effective communication practices that reflect our commitment to excellent customer service

Agencies can demonstrate this quality by regularly communicating with their customers. Communication can happen in person, by telephone, by mail, by email or online. All communications should be handled in a respectful and professional manner. All written communications should incorporate clear language. Websites, brochures and other information should be checked regularly to ensure that they are up-to-date and accurate.

Who Are Our Customers?

... and how can we get to know them better?

When we talk about customer service, we are talking about all of our customers. Of course, our primary customers are the adult learners that our agencies serve. Literacy agencies typically focus their customer service efforts on providing excellent service to their primary customers, i.e., adult learners, and this is as it should be. Our programs are learner-centred, which is one of our greatest strengths.

However, we have other secondary customers who also deserve excellent service including volunteers, other literacy organizations, social organizations, employment agencies, employers, MTCU, other funders, donors, members, supporters and other community stakeholders. All of these people and organizations help us achieve our mission and are key components in the work that we do.

These secondary customers are the agencies and people who provide services that support the literacy work that we do, fund the work that we do, refer students to us, accept referrals from us, partner with us, help promote the work that we do and provide any other type of support. When it comes to these secondary customers, we may not always stop and think about how we interact with them in terms of customer service.

One way to begin exploring customer service with these secondary customers is to ask them what you are doing well and not so well. This can be done by asking just a few pertinent questions through an in-person interview, a telephone survey, or an email survey. If you haven't already tried it, SurveyMonkey is a terrific tool for conducting short, easy and anonymous surveys via email links. You can find it at www.surveymonkey.com. Asking secondary customers their opinions about your agency's customer service is similar to the Learner Satisfaction Survey and learner exit interviews we use to find out what our learners like about our programs and how we might be able to improve. The findings from any of these customer service/customer satisfaction surveys and interviews can be used to help you develop your CIPMS plans for the coming year.

Here are just a few questions that you can ask secondary customers:

For volunteers:

- ◆ Do you find your volunteer duties to be meaningful and rewarding? Why or why not?
- ◆ What do you like best about being a literacy volunteer? Least?
- ◆ Do we provide enough training and support? If not, what could we do differently?
- ◆ Do we contact you often enough? Do we contact you too much?

For referral agencies:

- ◆ Do you refer clients to us? Why or why not?
- ◆ When you send clients to us, do they make progress and/or achieve any goals they may have?
- ◆ Do we provide you with enough information? If not, what can we do to improve this?

For some excellent information about customer service and seeking customer feedback, be sure to read *NonProfit Organizations and Customer Service: Handbook for Creating Customer Feedback Systems* by Paige Teegarden for Managance Consulting at www.managance.com/resources/media/ProfitOrgsAndCustomerService.pdf

Questions to Ask

Here are some questions that you can ask at your next staff meeting to get the discussion started about customer service in your agency:

- ⇒ Who are our customers?
- ⇒ What service(s) do we provide to our customers?
- ⇒ What do our customers think about our services? How do we know what they think?
- ⇒ Share an example of bad customer service you have received. How did it make you feel and why? What can we learn from that example?
- ⇒ Share an example of outstanding customer service you have *received*. How can we learn from that example to help us deliver excellent customer service?
- ⇒ Share an example of outstanding customer service that our agency has *provided*. How can we do this more often?



Customer Complaints

Like it or not, at some point in time you are probably going to get a complaint about your service. If your customers have a reason to complain (or think they do), do they know who to talk to at your agency? Do you have a written policy or procedure on how to deal with customer complaints and concerns? If you don't, now is a good time to create one.

Your agency's customer complaints procedures should be visible and accessible to all customers. They should be posted in all agency sites and on the agency's website, be included in the agency's policy manual, and be readily available if anyone requests them. Your agency should clearly state how it will accept complaints, i.e., in person, in writing, by telephone, by email or in a suggestion box. The name and/or position of the person to contact should be included along with their contact information (phone number, email, office hours). You should also clearly state that all complaints will be handled in confidence.

When a customer makes a complaint, it should be documented in writing along with whatever steps were taken to address the complaint. Records of complaints should be kept in confidential, locked files (or in password-protected documents) that can only be accessed by authorized personnel. Complaints should be handled as soon as is reasonably possible, i.e., within five business days. If customers are not happy with how the complaint is handled, they should be provided with information on how to further pursue the complaint. For example, they could contact a more senior staff person or the Chair of the Board of Directors.

When your agency is preparing its annual CIPMS plan, it is a good time to look at what type of complaints were received during the past year (if any) to determine if there are overall service or programming areas that could be improved.

Customer Service Tips

- ◆ Review your agency's mission statement to ensure that it reflects your commitment to providing good customer service.
- ◆ Remember that good customer service is integral to the work that we do. It should be the basis of all of our services and programs.
- ◆ One of the key components of good customer service is timeliness. Do you respond as quickly as possible when a customer requests information, wants to enrol, leaves a voice-mail message, etc.?
- ◆ Customers should be treated with respect. Are all staff members and volunteers trained in proper telephone and email etiquette? Are customers greeted when they come into your agency? Is everyone treated fairly and equally? Is information kept private and confidential?
- ◆ Include a personal touch where appropriate. In today's age of email and voice mail systems, it can be easy to forget that we are dealing with people. Acknowledge receipt of documents or other information sent electronically. Use the telephone or a personal visit to respond to a request for information rather than replying via email.
- ◆ Creating a warm and welcoming atmosphere can go a long way towards keeping customers happy. Do you greet new learners, volunteers and other customers with a smile and ask how you can help them? Do you provide a quiet place where they can talk with a staff member or volunteer? If appropriate, consider offering refreshments. If you have a waiting room, include up-to-date reading material along with information about your program that customers can look at if they have to wait a few minutes to speak to someone.
- ◆ Follow up with customers. For example, if you referred someone to another agency, call that person after a few days to find out if they followed through with the referral and if they did not, is there something else you can do to help.
- ◆ Go the extra mile. For example, if you make a referral to another agency but the person is unfamiliar with where that agency is located, you could print out a map or write directions. Some agencies will even accompany the person to the referral agency.
- ◆ Make sure that people can find you! Provide clear, concise directions to new customers and include clear directions in your advertising and promotional materials. For example, you could include a link to Google Maps on your website to help people locate your agency.
- ◆ Make sure that your hours of operation are clearly posted at your location and in your advertising and promotional information. Include contact information so customers can leave messages during times that your agency is closed. Keep this information up-to-date.
- ◆ If your agency uses an automated telephone system, keep it as clear and simple as possible. It should be easy for customers to reach the staff member or contact person they want to reach.
- ◆ Make sure that all of your written communication uses clear language. That includes any brochures, flyers, posters, policies and signage as well as your website, Facebook, Twitter and any other types of written communication you use. Keep this information up-to-date.



Customer Service Tips

- ◆ Pay attention to customer feedback. What do your customers like about your agency? How can you use that information to continue to improve your customer service? What don't they like? What changes can you make to improve customer satisfaction? (Remember to include this in your annual CIPMS planning!) When planning for customer service improvements, start with what you know, think about what you want to achieve and then create a specific action plan to meet your goals.
- ◆ Visit or talk with other agencies. How do they deliver good customer service? Are there ideas you can share with each other?
- ◆ Learn about customer service from the private sector! Many local business organizations, like the Chamber of Commerce, offer customer service training, often at little or no cost. Take advantage of these opportunities.
- ◆ Take a college course. You may be able to find a customer service training course at your local community college. Alternatively, check out OntarioLearn (www.ontariolearn.com) for online courses. Enter "customer service" in the search box to find available courses.
- ◆ Include customer service everywhere — as part of staff training, volunteer training, your agency's mission, your annual CIPMS plan, strategic planning sessions and your business plan.
- ◆ Customer service is about building relationships — with learners, donors, funders, other service providers. Spend time talking to learners in your agency to find out what they like and don't like. Similarly, take the opportunity to talk about why your funding proposal was or wasn't successful. Join local networking associations to get to know other service providers in your area. Follow up with donors to say thank-you and answer any questions they may have; a few minutes of your time today could result in ongoing financial support. Remember to thank your volunteers regularly and to talk to them to find out how you can improve their volunteer experiences.
- ◆ Follow up with any complaints or concerns that you receive. Good customer service includes addressing any problems. Learn from your mistakes as well as your successes!
- ◆ Customer service is also about outcomes. Can you confidently state what learners achieve in your program? Can you clearly outline the benefits literacy training provides? Do you meet deliverables promised when seeking funding?
- ◆ If a significant number of learners have a first language other than English, consider offering some services in other languages, if possible.
- ◆ Is your agency accessible? Many literacy agencies are located in rental premises so they have limited scope when it comes to make physical changes to the building. However, perhaps you can discuss making your location more accessible with your landlord. If physical changes are not possible, is there a way that you can provide accessible services to customers that need them?
- ◆ Have fun! If you are enjoying your job, and the people you work with, your customers will likely enjoy the learning environment too.



More Resources

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OCTOBER NEWSLETTER

Writing and Desktop Publishing:
Vicki Trottier with support from
Joanne Kaattari

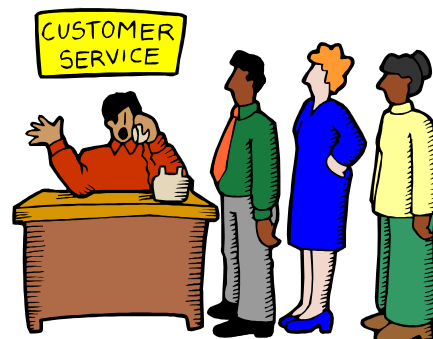
FUNDER

Community Literacy of Ontario is funded by
the Ontario government, under

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If you'd like to find out more about customer service, be sure to check out the following resources:

- ◆ *The 10 Commandments of Great Customer Service* can be found on About.com, which is a helpful website for just about any subject you are interested in. To go directly to this article, click here: <http://marketing.about.com/od/relationshipmarketing/a/crmtopten.htm>
- ◆ Customer First UK has created 32 customer service steps to excellence which provide a solid foundation for effective practices. You can find them at: www.customerfirst.org/Standards.aspx
- ◆ Customer Service Professionals is a website that is definitely worth a visit. It features a number of informative articles including *10 Tips for Impeccable Customer Service*, *Ten Tips for Effective Customer Service Training* and more. You can find these and other articles at www.customerservicemanager.com
- ◆ To learn more about volunteers and customer service, be sure to visit My Solution Spot at www.mysolutionspot.com where you will find an article called "Customer Service in Non-Profit Organizations: Five Ways to Bring It Into Focus".
- ◆ The Free Management Library is a terrific site loaded with all types of information related to not-for-profit organizations. Be sure to check out their customer service blog at <http://managementhelp.org/blogs/customer-service/> for some great ideas and tips.



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