ABSTRACT

Amidst the chaos of our changing landscape in volunteer management, we, as leaders, sometimes get caught up in the crisis of the day. What often gets left out is the focus on those whom we serve through our volunteer programs. Theoretically, we should be able to cite how everything we plan, everything we accomplish and every decision we make is from our customer's viewpoint. That focus is difficult to maintain while we juggle all the other responsibilities of leadership. This article provides reasons why focusing on customers is so critical to our organizations today. Based on four key elements of a good customer interaction, the article lists specific actions that a volunteer manager can take to improve the focus on the customer. Together staff and volunteers can set customer service standards that guide service delivery.

Customer-focused Service

Sue Waechter and Deb Kocsis

With the constant collaborations, partnerships and reorganizations within the voluntary sector today, serving the client sometimes takes a back seat. We too often get caught up in working on other urgencies and lose focus on serving our customers. Paul Light, Vice-President and Director of Governmental Studies at the Brookings Institution in Washington, D.C. USA, declares that nonprofits need to "reclaim their ownership of terms such as innovative, strategic, and entrepreneurial." What better place in our organizations to prove our innovative-ness, strategicness and entrepreneurial tendencies than in how we serve our clients. They are, after all, the reason we exist.

HOW IT FEELS

As customers, you and I know how it feels to be taken for granted or ignored. We find ourselves waiting for someone to help us with a question or to select an item to purchase, waiting for someone to acknowledge us. When they do, they may be most unpleasant for having been interrupted. Each of us has our favorite bad customer service story. And how many people have we told that story to? Recent studies have shown that for every one of us that is unhappy with an organization and talks about it, there are 20 more who are just as unhappy but have chosen not to say anything. That means that the service being delivered to your clients may be 20 times worse than you think it is!

Placing a low emphasis on positive client interactions may come back to haunt your volunteer program when it comes time for funders to evaluate the effectiveness of your services. Perhaps it will be the administration of your organization that will come to believe that the organization can, in fact, live without volunteer services.

A POSITIVE FOCUS ON CLIENTS

How can you create a positive focus on clients? Give staff and volunteers the tools

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they need to provide excellent service to each and every one of your clients. Do not assume that staff members and volunteers come to your organization with these skills in their back pockets. When providing orientation and training, give them some specific steps to follow that will allow them to consistently have a positive focus on clients. Then give them the opportunity to practice those steps so that they are prepared when they are on the front line for your organization.

WHAT DO CLIENTS WANT AND EXPECT?

Here are some presumptions about clients that we can make. See if they fit for you when you are in a customer/client role.

1. **Clients want to feel a connection to your organization.** Make sure when your clients first make contact with your organization that they feel immediately connected and welcomed. This may be in person, over the phone or via e-mail. The initial greeting sets the tone for the rest of the client's interaction with your organization. This is what we call the **Greet** step of a client interaction.

   Action: Instruct your volunteers to be friendly, enthusiastic, sincere, patient and authentic about how they serve the client. Give examples of what "friendly" looks like, what "sincere and enthusiastic" sounds like and what "patient and authentic" feels like. Have a team of volunteers help you define these in their own words. Some examples are:

   - When you first make eye contact with a client, always smile.
   - Sound enthusiastic by keeping your voice light and upbeat. Share your pride about the program and services through the tone of your voice.
   - Make good eye contact and always tell the truth; do not try to cover up for mistakes.

   Action: Consider the customer service "moments of truth" in your organization. What are all the times that a client comes into contact with your organization? Is it when a volunteer answers the phone? Is it when the client receives a newsletter in the mail? Is it when the client opens an e-mail? Is it when clients walk in the door? Examples of moments of truth in your organization might be:

- A client experiences a not-so-friendly greeting when coming into the organization.
- A client's question is not answered because the volunteer does not have enough information.
- A team member, an internal customer, working on a fundraising event does not feel valued by the volunteer team leader.
- A client's call is lost in the phone system when the volunteer attempts to transfer the call.
- A volunteer board member, out in the community, talks negatively about a decision made in the last board meeting.

   Get the volunteers together who have client contact while doing their jobs. Work with them to list all the possible opportunities for client interaction and then evaluate those "moments of truth" according to whether they think they are positive or negative experiences for your clients. Have the volunteers define actions to take to eliminate or improve negative interactions. If necessary, talk to your clients to find out exactly what they think about their interactions with your organization.

2. **Clients want to be understood.** Your clients want to know that the organization and people who staff it can meet their needs. This step requires your staff and volunteers to ask good questions to make sure that the client's needs, requests and situation are understood fully. Asking open-ended questions can help to delve into the client's situation. Many times, those who serve the clients directly make

quick assumptions about clients when they first come in or call in. That can cause trouble. Be open to hearing about the situation. We call this the **Scope** step.

Action: Teach volunteers to:
- Let the client tell his or her story first
- Ask open-ended questions in order to scope for the real needs of the client
- Check for understanding with the client.

3. **Clients want to feel important enough that their requests are taken care of completely.** We call this the **Own** step — owning the client's need long enough to sufficiently take care of it. This happens when staff and volunteers are empowered to solve the problem. How much authority do they currently have to meet the client's needs? Staff and volunteers usually do not feel as empowered as the leadership would like them to think they are. Because of policies, procedures, systems and processes, staff and volunteers often have to jump through hoops and get approval to take care of something that is outside their typical tasks.

   Action: Give staff and volunteers the freedom to act and assure them that meeting the client's needs is foremost. Do this by talking about their ability to make decisions to meet the client's needs. Give them examples of situations in which they might find themselves and talk through what they have the authority to do in that situation. Define the true boundaries that staff and volunteers have regarding regulations, safety, and liability. Dispel myths about other false or perceived boundaries. Then ask them to be creative within those boundaries to meet the client's needs. Reward them when they are creative.

4. **Clients want to feel satisfied.** We call this client interaction step **Close.** Clients need closure with your organization. Too often we go from one impersonal interaction to another during the day, especially with the use of technology. Understand that the relationship with your client is important. They want to be sent away with a good word or salutation. "Please" and "thank you" are often lost in many customer interactions.

   Instruct volunteers to add a closure and a follow-up, when appropriate, to their client interactions. Be sure that services are evaluated either in written or verbal form by your clients. This will give you the feedback you need to correct situations that are not satisfactory. It will also provide positive feedback you will need to specifically thank staff and volunteers for a job well done.

   Action: Have volunteers and staff brainstorm appropriate closures for their typical client interactions. Challenge them to try to leave their clients pleasantly astonished by their interaction with your organization.
   Examples:
   - If the staff person or volunteer learned something unique or personal about the client during the interaction, refer back to it. "I hope you enjoy your vacation next week!"
   - Make solid eye contact and tell them you really appreciate them as a client.
   - Avoid "Have a nice day." It is over-used.

Greet, Scope, Own and Close — the four steps that make up a complete client interaction. Consider these four steps within your volunteer program and determine which steps may be missing or need improvement. Take a good look at your organization through the client's eyes. Staff and volunteers will probably realize many more moments of truth for the clients than those your organization typically spends time on.

STANDARDS FOR CLIENT SERVICE

Now is a good time to look at the client focus in your organization.

- How often do you talk about the clients throughout the organization?
- When you make a change in your organization's processes, do you consider those changes from the client's perspective?
- Do you ask your clients for regular, reliable feedback?
- Is everyone clear about whom is served first in the organization?

If your organization does not have a client focus, start by establishing client services standards. Bring staff and volunteers together to talk about their expectations for how clients will be served. Agree on those expectations and label them your Standards for Client Service. Remember that an excellent Standard for Client Service may not be the most efficient way to complete a process, but it must be the most effective in the eyes of your client.

Some sample standards created by our clients in their organizations include:

- Always answer the phone by the third ring.
- Make eye contact and acknowledge a client's presence as soon as he or she enters the organization.
- Respond to all e-mails within 24 hours.
- Walk a client to another department or service area rather than simply giving directions.
- When transferring a client on the phone who has already explained a situation, explain the situation to the person who is receiving the transfer. Do not make the client repeat the story.
- Always thank each client for having come to the organization.
- When answering the phone, identify yourself and ask, "How can I help you?" instead of, "Can I help you?"
- In person with clients and on the phone, smile. You can hear a smile over the phone.
- When the organization has made a mistake, sincerely apologize to the client.
- Tell the client what you can do for them; do not list all the things you cannot do.

Once the standards are agreed to by everyone, check them to make sure they support the organization's mission. Then post them in workstations or laminate them on small cards for staff and volunteers to keep close at hand.

Finally, reward the efforts of staff and volunteers. Together, celebrate the positive outcomes of providing customer-focused service.

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