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A Checklist to Identify and Foster Alignment of Customer-Focused Priorities

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Overview

- Challenges to improve customer-focus
- Using the Customer-Focus Checklist
- SWOT analysis
- Creating service strategy

Expected Takeaways

- Gain clarity on needed strategic customer-centric initiatives
- Better stakeholder alignment on strengths, weaknesses, opportunities and threats (SWOT)
- Making the soft-side stuff more concrete and less subjective, such as
 - Customer perceptions
 - Employee engagement
 - Commitment to customer care



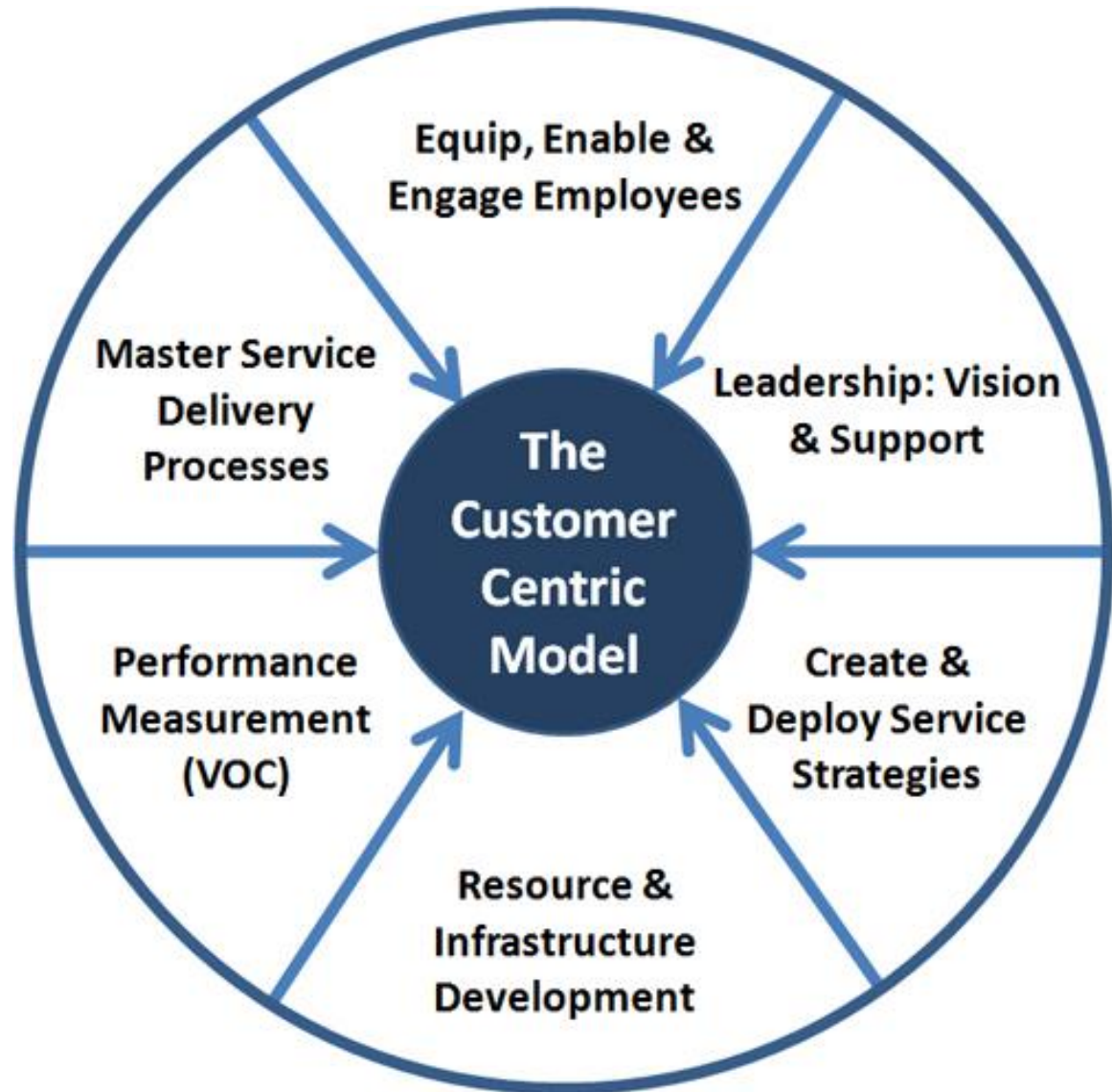
APATHY

IF WE DON'T TAKE CARE OF THE CUSTOMER,
MAYBE THEY'LL STOP BUGGING US.

Challenges to Improve Customer-Focus

- Customer service viewed as “cost” not revenue source.
- Overcoming inertia
- Climate or culture doesn’t stress customer-focus.
- Talking the talk but not walking the walk.
- Conflicts between stated values and manager behaviors
- Reactive culture versus systematic process approach.
- Measurement and data issues.
- Units don’t work in a cross functional way: Silo structure.
Dilbert is alive and well!

Customer-Focus Framework



Adapted from William Davidow and Bro Uttal

“Total Customer Service – The Ultimate Weapon”

Using the Customer-Focused Checklist

- For each item we look for evidence elements are in place and how well they serve the organization.
- For each element, use a rating of “0” or any number from 1 to 10.
- A “0” means the element is not present.
- A “1” means the element is present, but completely inadequate
- A “10” means the element is present and completely adequate to meet the organization’s vision for its service culture.
- Describe areas for improvement for each element.

Checklist Categories

- Strategic Artifacts
- The Soft Stuff
- Systems Artifacts

Strategic Artifacts

- Mission / vision / values (do these reflect a vision for, or a commitment to service?)
- Service standards?
- Service strategy?
- Core customers (able to identify and estimate value, priority segments)

The Soft Stuff

- Leadership vision & passion (is customer service excellence a priority?)
- Employee engagement (commitment / enthusiasm / loyalty)
- Employee enablement (managers help employees succeed in satisfying customers)
- Trust / cooperation / respect (workers – management; across functions, etc.)
- Stakeholder alignment (shared vision for customer care)
- Accountability for customers (employees with customer contact “own” transactions)

Systems Artifacts

- Service process maps & customer journey maps
- Voice-of-the-Customer (VOC – data gathering, analysis, right info to right people)
- Customer Satisfaction Measurement (CSM) (on-going measurement & improvement)
- Complaint handling system
- Corrective / preventive action systems (service issues in addition to product issues)
- Organization assessments (commitment to evaluating progress on key fronts)

Alternate Ways to Use the Checklist

- A. Have an Auditor score each item
- B. Sit down with the process owner of each item to determine their score for each element
- C. Invite all customer focus process owners (each touch point) to review and rate each item. In facilitated meeting, come together to review results and assign final score.

Use the checklist results to identify strengths, weaknesses, opportunities and threats (SWOT)

SWOT Analysis: Creating Service Strategy

<p><u>Strengths</u></p>	<p><u>Weaknesses</u></p>
<p><u>Opportunities</u></p>	<p><u>Threats</u></p>

Creating Service Strategy:

Where are you now? & Where are you going?

- Present state: For each key initiative, what is the current state, or point of departure?
- Future state: Where do you intend to be in 2-5 years (point of arrival)?
- What are the key steps to close the gap for each initiative?
- Note: Service strategy not same as service standards!

Which of These is Closest to Your Vision?

- We haven't really defined our vision for service, but as long as we aren't worse than the competition, then that's okay, or,
- Our vision is to have the people, systems and policies in place to foster planning, prevent problems, and continually improve such that we are the recognized service leader in our industry

PAST

PRESENT

Closing the Gap

FUTURE

Encores

Point of Departure

Drivers & Enablers

Results

Point of Arrival

VISION

Never Again

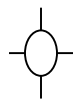
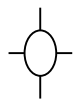
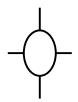
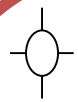
Release the Baggage !!!

What's working?

CONTROL

PANEL

What's not working?



Presentation Summary

- Provided approach to clarify needed strategic customer-centric initiatives
- Discussed how to attain better stakeholder alignment on strengths, weaknesses, opportunities and threats (SWOT) analysis
- Made some of the soft-side elements more concrete and less subjective

White Papers Available on Request:

1. “Competing Through Passionate & Relevant Service”
2. “Increasing the Power of Customer Satisfaction Measurement” (Barrier Surveys)
3. “Alternative Designs and Methods for Customer Satisfaction Measurement”
4. “Enhance Your Quality System With CSM”
5. “Building Trust in Key Customer - Supplier Relationships”
6. “Create A Successful Satisfaction Measurement System”
7. “Improve Core Customer Relationships: A Framework to Implement Face-to-Face Surveys”

Questions?