

Premium Customer Service

Lynn E. Lawrence, CMSgt(ret), USAF
MSOL, CPOT, ABOC, COA, OSC



1

Blue Lives Matter

- On Jan. 18, Andrew Michalak of Gastonia, N.C., was driving home from work when he hit a parked car. Police officers responding on the scene said later that Michalak was acting strange, erratic and "incoherent."
- That's when Michalak reached for an ice scraper underneath his seat, according to WSOC-TV in Charlotte, N.C. Officers, fearing he had a weapon and was on drugs, tackled him and arrested him on suspicion of driving while intoxicated and assault, placing him in handcuffs

2

- "(Michalak) just went from being so out of it to being perfectly normal," Ewers told WBTV in Charlotte. Michalak also told Ewers that he had been having seizures and persuaded him to call the restaurant where he worked so that his boss could confirm his story.
- Ewers, who told WSOC he has been trained to spot physical illnesses, decided to drop the charges against Michalak and instead recommended that he see a doctor.
- Not long after that, Ewers, along with other members of the Gastonia police department, received thank you notes from Michalak.
- As it turns out, Michalak did visit a doctor, who informed him that his seizures were the result of Stage 4 lung cancer that had spread to his brain. As a result, Michalak started receiving treatment, and despite his diagnosis, he says he is grateful to the men who spurred him to get help before it was too late.

<http://www.msn.com/en-us/news/good-news/officers-tackled-him-to-the-ground-and-handcuffed-him-he-says-they-saved-his-life/ar-AAogzKK7i=AAK6ORB&ocid=spartanntp>

3

Course Objectives

This course is designed to identify ways to enhance customer service and to discuss ways to provide an experience that exceeds your customers expectations and implants a desire within them to return to your professional staff. We will also discuss neutralizing difficult patient situations.

4

Study's Show

- [Study finds 96 percent of online complaints about doctors fault customer service, not quality of care](#)
An analysis of nearly 35,000 online reviews of doctors nationwide finds that customer service—not physicians' medical expertise...



MedicalOfficeManager@PLMSubscribers.com

5

New Opportunities

The Affordable Care Act seeking to reduce health care costs by encouraging doctors, hospitals and other health care providers to form networks which coordinate patient care and become eligible for bonuses when they deliver that care more efficiently.

6

ACO Expectations & ACO Readiness Accountable Care Organizations

Measurable Criteria:

- Breadth of access and ease of scheduling
- **Quality exam**
- **Friendly and courteous staff**
- **Proper coding and billing**
- Accurate and timely transmission of exam results / data
- Socio-Economic Status does not matter

7

Goals = What is going to get us there

- Advanced Eye Care Services
- State-of-the-Art Technology
- High Quality Vision Products
- Unmatched Personal Care



8

DUE TO THE FACT THAT **WE ARE A MEDICAL CLINIC**, THERE ARE TIMES WE ARE RUNNING BEHIND AND WE HAVE TO RESCHEDULE APPOINTMENTS DUE TO EMERGENCIES. WE DON'T NOT APOLOGIZE. WE AIN'T SORRY. WE AIN'T NEVER GOING TO BE SORRY. IF YOU CAN'T WAIT, PLEASE PROCEED TO THE CHECKOUT WINDOW.



9

Customer Comments

- Thorough
- Friendly
- Competent
- Patient
- Lifestyle Focused
- Professional
- Well Trained
- Welcoming
- Advance technology



10

Objectives

- Identify criteria for premium customer service
- Understand leadership's role in establishing customer service
- Discuss the importance of staff training
- Environmental considerations
- Staff appearance and attitudes
- Creating a lasting memory for the visit

11

Customer Service Defined

• **CUSTOMER**, *noun*

- **1.** One who frequents any place of sale for the sake of purchasing goods; one who purchases goods or wares.

• **SERVICE**, *noun* [From Latin *servitium*.]

- **1.** In a *general sense*, labor of body or of body and mind, performed at the command of a superior, or the pursuance of duty, or for the benefit of another.

12



Quote

- The foundation for creating a customer service culture is understanding expectations, going the extra mile, and being the customer's advocate ...
- Dale Carnegie Institute

13



Where to Begin

- **Top-down involvement**
- Interview
- Assign a trainer
- Start Orientation Day 1
- Don't allow new employees to form bad habits
- Be consistent
- Do not leave a new employee alone

14

Great Customer Service

- A system of standards
- Begins at the leadership level
- Enforced by supervision
- Enhanced by training
- Verified by soliciting customer feedback
- Expectations/outcomes are monitored
- A customer focused organization is steered in service excellence

15

Take Pride In Your Work

- Personal Responsibility In Daily Efforts



16



17

Audience Participation

Why go to Walt Disney?

18

The Disney Experience



19

1. The Magic of Setting in the Service Experience

At Disney's parks, guests are treated to re-creation of famous Disney settings. Visiting the various areas of the park, guests are immersed in the Disney service experience and feel as if they're a part of Disney. Every detail of the settings counts towards creating that magical customer experience.

20

2. The Magic of Cast in the Service Experience

Think of your last Disney experience? What were the people like? At Disney, all "Cast" Members (Employees at the Park) are friendly, approachable, and helpful without being condescending or mechanical. I recently was at Disneyland with my family and as we entered the park at opening time, we were greeted as we walked down Main Street by smiling, happy, employees waving to guests with giant Mickey Mouse hands. At Disney, every team member knows, studies, and understands the behaviors, mannerisms, terms, and values that are specific to his or her job function. Every job function is measured against the core service values of the organization.

21

3. The Magic of Action in the Service Experience

At Disney, team members are trained to look for combustion points. **Combustion Points are where even finely tuned, positive customer experience processes break down, creating negative customer experiences.** Where are the combustion points at your organization and within your team? **What are your positive customer service experience creating areas where because of break downs, system failures, or poor performance by team members, negative experiences breed?** Disney focuses on uses **cast-guest communication, guest-flow, and service attention** processes to eliminate or control these points.

22

Walt Disney Lessons

- There are five powerful lessons in business, lessons carefully developed by the Disney organization in its never-ending pursuit of excellence. These universal pillars of a successful business:
 - creativity/innovation
 - leadership excellence
 - customer experience
 - brand loyalty
 - employee engagement
- These are the keys to sustained business excellence. **Together, these lessons forge an enduring bond between inspired leaders, motivated employees, satisfied customers and an ability to continually recreate and grow the brand.**

23

Disney's Leadership Approach

At Disney, leadership is not defined by your title – it's defined by your actions. Our leaders proactively work to align their values with the Company's vision and the result is a motivated, innovative, and productive workforce. We believe every leader has the opportunity to serve as a role model for future generations and that the way you lead tells a story about your values and creates a leadership legacy

24

Creating Your Experience

Your customer service experience setting will be wherever your customers interact with your people and systems. **Every detail of the encounter sends a message to the customer. Phone calls, emails, live chat, even Web sites speak to customers.** What's the message you're sending? Does it say "we care about the customer"?

25

Ophthalmic Contrast Norms

- Ophthalmic leaders are not normally given any leadership training
- Normally we accept the most senior person, even if they do not have the best leadership skills
- Most ODs do not enjoy confrontation
- Most offices without clearly delineated leaders suffer with morale issues

26

Value of Training

What do customers remember more — products or people? When Walt Disney determined the answer was people, he hit upon a fundamental business truth that led to the immediate and sustained success of The Walt Disney Company. At Disney, we synchronize **the mission of each Cast member with the culture of the whole organization to create an extraordinary Guest (customer) and Cast (employee) experience.** How do we do this? It starts with extraordinary attention to detail in our hiring and training processes that ensures we hire and **develop people who fit our culture.** We then create and nurture a work environment that reinforces engagement.

27

Ophthalmic Contrast Norms

- Most offices:
 - do not have a formal orientation process or formal training program
 - Staff are not trained



28

Disney's Empowerment

Though considered a global leader in creativity and groundbreaking entertainment, **Disney continues to seek new ideas that will contribute to even greater success.** In this course, Disney shares methods that can be employed immediately, and with little to no cost, **to maximize the rich resources every organization already has – your people!** Disney understands that engaging and encouraging the imaginative power of employees creates a lasting competitive advantage and maximizes an organization's potential.

29

Disney Quality Service

The long-standing reputation Disney has for incredible service and friendly employees is not just magic, it is a sound service philosophy consistently applied in business. No matter your industry or organization, we believe that exceptional service is achievable because you control the factors. **At Disney, everyone strives to exceed customer expectations every day because our processes are designed to meet this goal.** For more than 80 years, this pursuit of excellence has earned Disney a world-renowned reputation for quality service that you can now begin to adapt for the unique needs of your organization.

30

Brand Loyalty

The Walt Disney Company is one of the most recognized and admired brands in the world. Across the globe, whether producing films, television shows, consumer products or vacation experiences, **the Disney brand is trusted to provide a quality entertainment experience. Consumers everywhere know what to expect from Disney. It is this consistency of delivery that differentiates the Disney brand and creates enduring customer loyalty.**

31

Walt Disney Wrap

- Transparent operations: leadership and behind the scene and underground
- Staff training prior to engaging customers
- Enforced company standards
- Representing something bigger than yourself



32

Audience Experience

Participation Question

The Customer Experience

- Why are they here?
- What are their expectations
- How well you listen is extremely important
- Repeat back what you heard



33

34

Quote

About 70% of buying decisions are based on positive human interactions with the sales staff. People buy from people, not companies



35

Leaders must decide the level of customer service

Leadership must be ready to engage on behalf of the staff and the patient evenly... be approachable

Stand on the side of right at all times, systemic integrity

Policies sometimes need to be reviewed and regularly and even changed when needed

Don't throw the staff under the bus in front of others... including co-workers

The Top-Down Approach

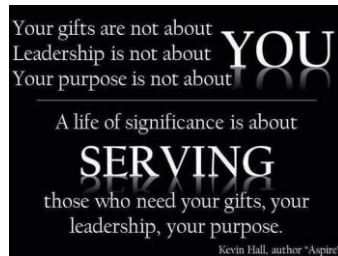
**YOU DON'T
BUILD A BUSINESS
-YOU BUILD PEOPLE-
AND THEN PEOPLE
BUILD THE BUSINESS.**
-ZIG ZIGLAR
ZIGLAR.COM

Leaders set the tone for everyone

36

A Leaders Example

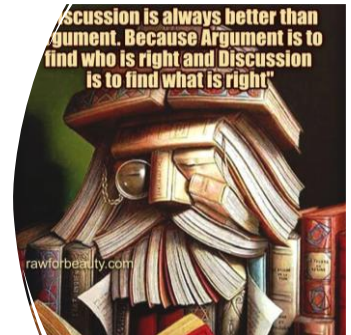
- You never have an excuse for a lack of professionalism, and do the same for your staff
- You are the example for the entire staff, so your actions will be emulated by your staff
- You are the example of acceptable behavior



37

Leaders Set The Example

- The doctor is the lead and must set the standard for customer care, so you must care
- The staff will take off of your lead



38

High Standards

- Leadership sets operational standards
- Offices with high standards have high morale
- What you allow, will continue
- Accountability and responsibility start here
- Everyone's



39

"Be more concerned with your character than your reputation, because your character is what you really are, while your reputation is merely what others think you are."

-John Wooden

40

Audience Experience

Participation Question



What Is It That We Deliver To Our Customers?

41

42

The Expectation

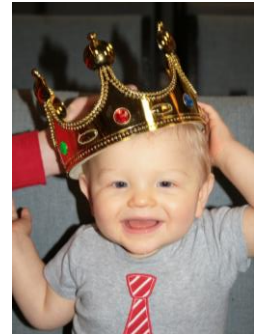
- Friendly staff is a must
- What do your customers want? What do they need?
- Are you asking your customers if your staff is meeting their expectations?
- How are you verifying customer satisfaction?



43

Make Them Feel Valued

- This is not just a job
- I am a professional ready to deliver the highest level of care available on the planet
- It is "all about you"
- They should feel like royalty when they leave



44



45

Everyone Should Smile

- Greeting are important
- People should feel that you welcomed
- You add warmth and humanity to their visit
- Make your attitude contagious
- What ever you feel on the inside will exit on your face

YOU'RE NEVER
FULLY DRESSED
WITHOUT A...

smile!



46

The Presentation

- What does your office look like from the parking lot to the exam area?
- How does the staff present themselves
- Is there a feeling of warmth in your office
- Does your office look professional?



47

Perception Become Reality

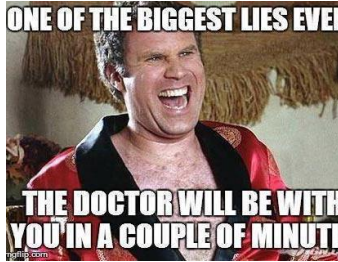
- Look from your perspective and from the customer's perspective
- Perception becomes reality
- If customers have a great experience they will tell between 2-5 people, but if the experience is negative they will tell as many as possible



48

Communicate

- Staff should talk to each other
- Staff should communicate to customers
- Continuous updates



49

Perspective

- Perspective is a proximity issue
- The customer perspective
- The staff perspective



50

Special Needs (ADA requirements)

- Some of the best questions to ask when booking an appointment:
 - What is the specific need you want address during the appointment?
 - What method of payment?
 - ARE THERE ANY SPECIAL NEEDS (i.e.: mobility, hearing, etc.)
 - Do you have a service animal?
 - Is the animal required due your disability?
 - What task has the animal been trained to perform

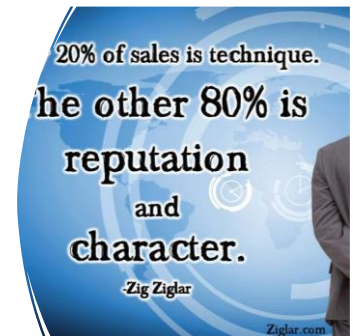
[The Americans with Disabilities Act](#) | [ADA.gov](#)



51

100% Character

- Organizational
- Leadership
- Staff
- Individual



52

Customer Service Never Ends

- If they think they are royalty, let them know they are in the right place
- Treat them all with:
 - Courtesy
 - Respect
 - Sensitivity



53

Be In Control At All Times

- There will be stressful situations
- Never surrender your authority to your emotions
- Get help from a teammate or leadership when you are in too deep
- Never let them see you cry; they will own you



54

The Team Approach

- It shouldn't matter who on the staff is engaging the patient, it should be a team approach
- Everyone must be willing to make the patient's experience the best one ever
- Engage the patient every available opportunity

THE BEST THINGS
IN LIFE
ARE EARNED BY
MAKING
'DAILY DEPOSITS'
INTO THE
EFFORT ACCOUNT
NEEDED TO
ACHIEVE IT.
-TOM ZIGLAR

55

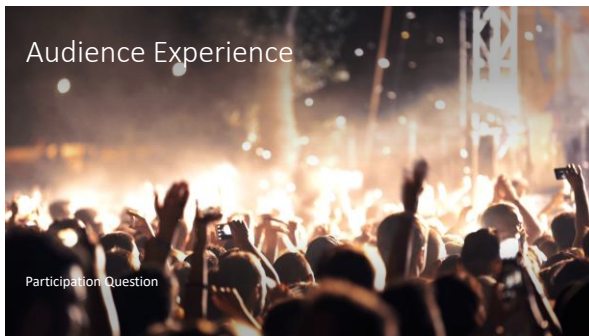
Staff Training

- Staff members must be trained on policies
- Review and changes must be made to facilitate growth
- Real scenarios without names can be used to educate staff on proper handling of situations



56

Audience Experience



Participation Question

57

Internal Feedback

- Staff meetings
- How do you assess your staff's opinion on customer care?
- How is leadership addressing customer care?
- Discuss situations, leave out the names
- Internal surveys



Can the team live with decisions and choices made by you?

58

External Feedback

- What do our patients really think about our service?
- How often do you ask?
- Regular surveys are helpful in getting a pulse on what you are doing
- Avoid allowing just the unhappy customers a chance to have input



Is this a practice you want your family to come to?

59

Managing Expectations

- Deliver what you can
- Be honest at all times
- When you make a mistake, own it immediately
- Never make the patient feel uncomfortable
- Two-sided trust is essential

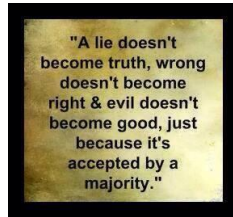


**How it feels
to meet your idol**

60

The Customer Is Not Always Right

- What happens when you cannot meet their needs?
- Give options, never say what you can't do, but tell them what you can do
- Documentation is critical and be specific
- You don't want to lose money, so count the cost
- You don't want to lose the patient



61

Audience Experience

Participation Question

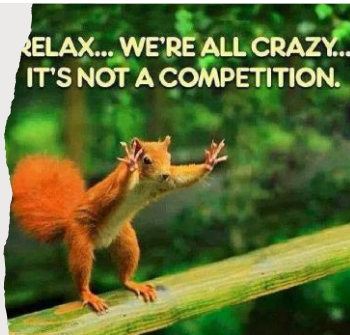


62

Communication is Critical

- Staff meetings
- Patients
 - Delays
 - Complications
 - Eliminate surprises
 - Glasses/contacts/ appointment changes
- Manage everyone's time

RELAX... WE'RE ALL CRAZY...
IT'S NOT A COMPETITION.



63

Eye Contact

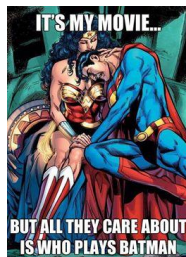
- Successful communication begins with eye contact
- Respect
- Severity
- Joy
- Never let them see you become unraveled
- It is not their fault when you become unprofessional



64

Conflict Resolution

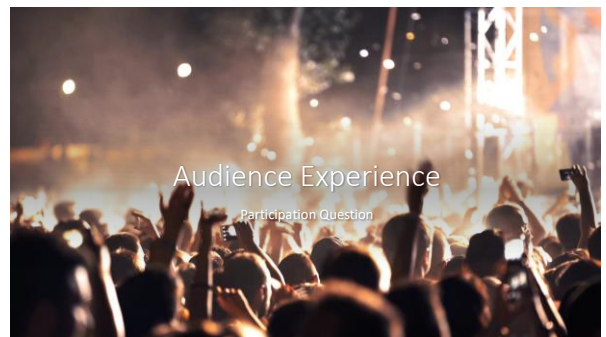
- Situational Awareness
- **Get all of the facts**
- **Listen more than you speak**
- **Give Options**
- Control the situation
- Pass the baton when the situation escalates beyond your comfort level or expertise
- Document, Document



65

Audience Experience

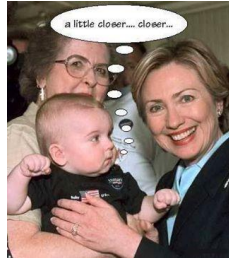
Participation Question



66

Hot Buttons and Bad Situations

- Facial Expressions
- Subjects
- Attitudes
- Language, tone, and use of words, choose your words wisely
- Location (not in the primary waiting area)
- Humor is rarely welcomed during a difficult situation



67

Ways To Diffuse Bad Situations cont...

- Offer options that are within companies policies, let them accept or refuse
- No kitchen sink discussions, one problem at a time
- Take notes, write it all down
- Thank the patient for identifying the issue
- Be prepared to call 911



68

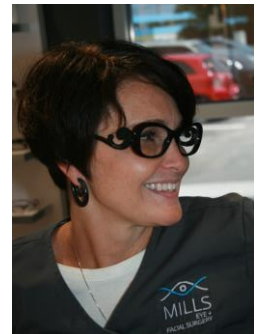
Communication Between the Customer and the Staff

- **Listening** is **very** important
- **Agreeing** with the customer **always** helps relations
- **Body language** has a **huge** effect
- **Being clear** and able to explain steps in an efficient matter
- When the staff is wrong, own it, don't make excuses

69

Pride and Ownership

- Developing organizational pride and holding every employee accountable for the company's mission and goals will inspire ownership
- When the employees gain buy-in, they will do their part and protect the vision and mission of the practice



70

The Problem-Solving Process

- Define the problem
- Research and Analyze the problem
- Establish a Checklist of Criteria
- List Possible Alternatives
- Evaluate Each Alternative
- Select the Best Alternative
- Discuss How to Implement it/them
- Simple ways of resolving a conflict

71



Customer Problem Solving Tips

- Express Respect
- Listen to understand
- Uncover the expectation
- Repeat the specifics
- Look for possible solutions

72

Customer Problem Solving Tips

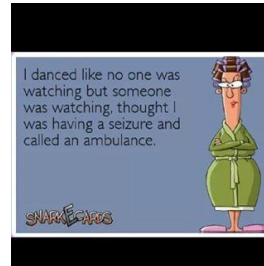
- Take action AND follow-up the situation
- Don't propose a solution that you cannot follow through on
- Double check for satisfaction
- Always thank them for bringing forward the problem



73

Documenting The Incident

- The patient is not always correct
- Document and be ready to complete an "incident report"
- Leadership involvement is critical as soon as the situation becomes uncomfortable
- Reserve the right to refuse service/ disengage patient from the patient in EMR
- Take every threat seriously, notify the local authorities



74

Lasting Memory

- What are the last thoughts of the visit you want them to have
- What made their visit to your office different from any other office
- What can you do to enhance the experience
- Will they go on tell their family and friends about the experience



75

Care For Them Like Family

- Please tell me that you treat your family good
- Create an environment that makes the patients want to bring their family members back
- Disney example



76

Staff Members Are Linchpins

- Everyone on the team must be prepared to engage the rough situation
- Customer Service is a team effort and everyone must be prepared to engage in a situation to make the customer happy
- Leaders have to back the employees when they are right



77

Some Things Can't Be Discussed

- There are misunderstandings that just cannot be explained away
- Don't make excuses, stay to the facts
- Give acceptable options to the practice and allow the customer to pick one of your choices
- Document the incident immediately and get statements from witnesses



78

Thank
You

martralyn@msn.com

