

Session 1, Case Study A

The New Job

Jane stared at her calendar and took a deep breath. Only 15 minutes until her meeting with the administrator from the School of X. She was not looking forward to the meeting. It was only her third week on the job, and she wasn't feeling very confident.

She had been really excited about this new job with one of the university's central administrative units. She wanted a challenge, but not like this. She had been hired to replace a staff person who had retired unexpectedly after 25 years in the same position. Her first few weeks on the job had been spent meeting with her supervisor as often as his schedule would allow, and writing down as much as she could about the functions and activities she was responsible for carrying out. Her job seemed to become even more complex when she spoke with her colleagues and learned that their procedures often didn't align with what the supervisor had said should happen. She was worried she wouldn't be able to keep all of the information straight while trying to help the administrator.

Jane picked up her file folder filled with the notes she'd taken and headed out the door to her meeting. She might as well get this over with.

Case Study Worksheet

Case: *The New Job* - Session 1, Case Study A

Who is/are the customer(s) represented in this case?
How was good or poor service demonstrated? What will be the impact?
Using the Culture of Service Triangle, what went right or wrong in each of the areas of <u>Customer Service</u> , <u>Employee Satisfaction</u> and <u>Operational Effectiveness</u> ?
What would happen differently in a Culture of Service environment?

Session 1, Case Study B

Seeing Red

Fred shifted in his seat. This forum for school administrators would be over soon, and then he needed to hurry back for a meeting with one of the chairs he supported.

The last speaker was introduced. She was the director from one of the central admin units that he worked with frequently. He was very interested to hear what she had to say – he along with most of the other administrators he knew always complained about having to work with this unit. When you sent in a request, you never knew when you would hear back. It was like throwing something into a black hole, which made it very difficult for him to plan his work and ensure he met deadlines. Maybe this unit was finally making some improvements.

The director spoke about how her unit was now using metrics to measure their performance. She displayed a scorecard on the screen with measures showing average response time and average delivery times for the core services her unit provided. The director pointed out that they had met their performance targets and achieved green status for every metric. She praised her team for all of their hard work. Fred rolled his eyes. When the director asked for questions, he raised his hand and asked, “How can your scorecard be all green when all I feel is red when I work with your department?”

Case Study Worksheet

Case: *Seeing Red* - Session 1, Case Study B

Who is/are the customer(s) represented in this case?
How was good or poor service demonstrated? What will be the impact?
Using the Culture of Service Triangle, what went right or wrong in each of the areas of <u>Customer Service</u> , <u>Employee Satisfaction</u> and <u>Operational Effectiveness</u> ?
What would happen differently in a Culture of Service environment?

Session 1, Case Study C

Demonstrating a Culture of Service

Samantha walked back to her desk just inside her department's main entryway and looked around to make sure no one had seen her leave her desk. It was Monday, a day when more students than usual came by her desk, looking for the X Office. She didn't work for X Office, but Samantha prided herself on providing great customer service, even to customers of other departments. When someone stopped by her desk asking for directions, she always made it a point to smile, stop what she was doing and personally walk them down the hall to where they needed to go. She had learned long ago that when she just pointed people in the right direction through the maze of hallways and cubicles, they usually returned as lost as ever. It was much easier to escort the students where they needed to go, and it was a great way to demonstrate a culture of service: "Yes, I will help you."

Unfortunately, her supervisor didn't see it this way. He was always asking why she wasn't at her desk, commenting on how much time she spent with students served by other departments and allowing interruptions to distract her. During their last 1:1 he had even mentioned potentially moving her to a different desk and leaving the front entrance unstaffed. Samantha shook her head. If she didn't help the lost students, who would? Weren't students the reason the university existed? Shouldn't helping them be everyone's shared responsibility? She had the culture of service attitude, but it didn't seem to be doing her any good.

Case Study Worksheet

Case: *Demonstrating a Culture of Service* - Session 1, Case Study C

Who is/are the customer(s) represented in this case?
How was good or poor service demonstrated? What will be the impact?
Using the Culture of Service Triangle, what went right or wrong in each of the areas of <u>Customer Service</u> , <u>Employee Satisfaction</u> and <u>Operational Effectiveness</u> ?
What would happen differently in a Culture of Service environment?

Session 1, Case Study D

The Org Chart

Shawna could hear her neighbor start up his lawnmower right outside her window and tried to stay focused on her laptop screen. It was her telecommute day as well as budget season, which always meant extra work, and Shawna had committed to her administrator to submit this final report by 8:00 a.m. tomorrow.

Thankfully, she'd completed the number-crunching work of the budget. All she needed now was to do some searching on the university's web site for supporting documentation. Shawna's administrator had asked for benchmarking against other departments since most had a support position that her department lacked. In order to make the department's case, she needed to attach org charts from similar departments.

She quickly found org charts from several different units and then found the website for Department X – the one her administrator had specifically requested. Since org charts never seemed to be located in the same place for any department, she had quickly developed a hunt and click method that usually led her to what she was looking for. From Department X's home page, she clicked on "About Us" and got the dreaded 404 error. Undeterred, she looked under "Contact Us" which led to a webform for general questions and a list of FAQs. Sighing, she began a series of clicking on links from every page on the site, but she couldn't even find a complete staffing list, let alone an org chart. All she found were instructions to call the office for further information.

Shawna looked at the clock. It was after 6:00 p.m. and she was fairly sure no one would be in the office. Now all she could do was hope someone from Department X would not only be in the office by 7:30 a.m. tomorrow, but also be able to provide her with the organizational information she needed to complete her report on time. Judging by the state of Department X's website, her hopes weren't high.

Case Study Worksheet

Case: *The Org Chart* - Session 1, Case Study D

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Session 2, Case Study E

Just a Quick Question

After 21 years with the same department, it was a source of pride for Terrance that people in his department sought him out to help with complex problems. After this much time, he'd seen it all. So he was taken aback when one of his coworkers came to him asking a question about a policy and he didn't know the answer. No problem, he assured his coworker, he would find the answer. He looked on the appropriate central administration department website, but unfortunately, he could not find information that matched the specific situation. He decided to make a call directly to the unit that seemed most likely have the answer.

He was relieved to hear an actual person answer the phone rather than voicemail and thought, "Good, this shouldn't take too much time." Terrance introduced himself, where he worked, the situation and the question he had about the policy.

"Well, I'm not sure about that. Let me send you over to Cindy. She should know," was the quick response. He could hear the call being transferred. "Hi, this is Cindy. Who's this?"

Once more, Terrance introduced himself, where he worked, the situation and the question he had about the policy. Cindy responded, "You'll find all the information on the policy on our website. Be sure to look under FAQs, and you'll find the specific detail you are looking for." Terrance thought that he might have missed something the first time he looked, so he thanked Cindy and hung up. Back on the website, Terrance found the FAQs but there was nothing that referred specifically to the question he had about the policy.

Terrance called the number again. He wished he had remembered to get Cindy's number so he could have called her back directly. He recognized the voice from the first call and asked to speak to Cindy. He was transferred again, but this time, he was directed to Cindy's voicemail. As he left a message re-explaining who he was, the situation and his question about the policy, he thought to himself, "This is going to take forever."

Case Study Worksheet

Case: *Just a Quick Question* - Session 2, Case Study E

Who is/are the customer(s) represented in this case?
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Session 2, Case Study F

Office Overload

Jeremy stood up from his chair and stretched. He had been at his desk processing paperwork for the past three hours and needed a break. This was the busiest time of the year at central admin office X, and work was piling up faster than anyone could work the stacks. For the first time in years, people in his office were worried they wouldn't make the deadline.

Things were so bad that recently the unit's leadership announced they were closing the office for the next week so that staff could focus 100% on the work required to make the deadline and not be interrupted by drop-in questions from students and staff. Each office employee was asked to use automatic email and voicemail messages explaining that due to heavy workloads it could take up to a week for a response.

As Jeremy stepped out through a side door into the main hallway, he saw a group waiting outside the main office reading the closed sign posted on the door. One young woman looked confused, while the other two women chatted in irritated tones. He momentarily considered heading back the way he came.

Unfortunately, one of the women saw him, "Hey, do you work here? I need some help and the sign says you're closed." All three were walking toward him now. He wasn't going to be able to escape.

Jeremy took a breath and smiled his best service smile. "Yes, I'm sorry. We are closed for the next week for annual processing. We'll be open next week and someone will be happy to help you then."

The woman wasn't giving up that easily. "Well, you're here now. You can answer our questions." Nodding at the rest of her group, she added. "We'll make it quick."

Jeremy didn't know what to do. He didn't have the time, and he was supposed to be focused on meeting the deadline. If the deadline was missed, their office was going to have much bigger problems than a couple of unhappy customers.

Case Study Worksheet

Case: *Office Overload* - Session 2, Case Study F

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Session 2, Case Study G

Service Standards

Michone hit save on the PowerPoint she had prepared for the staff meeting set to begin in just a few minutes. This would be only her second staff meeting as the new supervisor for a central service unit. During her interview, it had been made clear to her that she would be expected to help improve this unit's operations.

The staff meeting started with the usual pleasantries. Then, Michone launched the presentation she had prepared. She began by showing the results of a recent customer service satisfaction survey for their unit. The unit had received relatively low ratings around professionalism and respect. Michone cited customer comments describing how customers felt they were often spoken to condescendingly or made to feel incompetent by members of the team.

The last slide outlined three new customer service standards she had developed for the unit that everyone on the team would be expected to follow:

- Greet, smile, be friendly, enthusiastic and confident
- Treat everyone like they are special
- Always ask, "What else can I do for you?"

As Michone finished, she looked out at her team. Almost everyone had their arms crossed and was glaring at her. She turned to John, who was sitting to her right. "John, did you have a question?"

John sat up and looked around at his colleagues. "All of us have way too much work to do. We don't have time to be worrying about everyone's feelings!"

Deanna next to him nodded. "Our jobs are to ensure compliance and reduce risk to the university. Our customer is the university, not staff – of course they don't like what we ask them to do."

Michone glanced back at the service standards slide feeling a little peeved with her team's attitude. She wasn't sure how to respond.

Case Study Worksheet

Case: *Service Standards* - Session 2, Case Study G

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Session 2, Case Study H

The Handbook

After months of work, the Unit X Training and Compliance Handbook was almost ready to go-live on the website. Tim was waiting to hear back from just one more reviewer from his unit, Marjorie. He couldn't help but feel proud. When he was promoted at the beginning of the year, he had spent considerable time meeting with folks in his department and learning about their concerns and issues. Almost every staff person he spoke with told him they were very concerned about the risk of being out of compliance on specific types of training mandated by the state and federal governments.

Tim had taken the initiative to dig into the information regarding the required training. He found there were several university departments that oversaw, presented, and tracked the different types of related training, but he couldn't find any place where all the information was provided in a single source. He decided to put together a handbook that would provide all of this information in one place that could be referenced by staff in his organization to find out about applicable training for their position and how to enroll. It wasn't easy, but Tim spent several weeks of research combing through university and state/federal agency websites. He also met with staff in many of the university departments that provided and tracked the trainings to make sure the information he was collecting would be accurate.

Tim glanced at his screen and saw that Marjorie had just sent him an email: "Tim, isn't this exactly what Department A has on their website?" Tim clicked on the link she had provided. Sure enough, there was an online handbook with shared information on required compliance training just like what he had spent weeks creating. Why hadn't he uncovered this during his extensive search? He had even spoken with someone from Department A. It would have been nice if she had mentioned having the same document he was asking her about.

"Great," Tim thought. "The first big accomplishment in my new role turns out to be reinventing the wheel."

Case Study Worksheet

Case: *The Handbook* - Session 2, Case Study H

Who is/are the customer(s) represented in this case?
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