



The Strategic Edge: Awesome Finance Customer Service

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William C. Statler

Fiscal Policy ■ Financial Planning ■ Analysis ■ Training ■ Organizational Review



Finance and Customer Service

- Finance folks often think customer service happens by “operating departments” and that internal service organizations like finance, human resources and information technology only on periphery at best.
- But internal service organizations should be vanguard of any organization-wide customer service improvement efforts.
- Stated simply, no one in the organization is going to take “external” customer service efforts seriously if they receive poor customer service internally.

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Overview

- Strategic importance of providing awesome customer service.
- Tips on how Finance organizations can lead the way in delighting their customers with the services they provide while also meeting internal control and fiscal health responsibilities.
 - Not “and/or” but “and, and”

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Finance Customer Service Role

- Some “citizen-facing”
 - Utility billing
 - Business license/tax
 - Cashiering
- But deeply engaged in servicing “internal” customers
 - **Direct:** Payroll, accounts payable, purchasing, interim financial reporting and budget
 - **Indirect:** Internal customers key beneficiaries of fiscal stability and long-term fiscal health efforts (get to keep jobs and pay raises)

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Strategic Importance

- Providing great customer service intrinsically “good” thing to do.
- But don’t overlook its strategic importance.
 - Essential in building community and organization trust.
 - And there will be times when this will be critically important.

With trust, anything is possible; without it, nothing is.

**Ken Hampian,
Retired City Manager**

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Stories are powerful

- The stories our customers tell about us around the campfire matter.
- “An unhappy customer remembers the incident for 23½ years and talks about it for 18 months.”
 - White House Office of Consumer Affairs

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How to deliver awesome customer service

- And protect assets and long-term fiscal health.
 - Fine line between cutting red tape and chaos.
 - And we should not be in the chaos business.

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Three Key Success Factors

- Culture
- Assessing current customer service environment
- Reinforce/improve customer service ethic and delivery through rites and rituals
 - Road map to behavior

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1 Organizational Culture

- What is it?
 - “Set of shared assumptions that guide behaviors.”
 - ❖ Davide Ravasi and Majken Shultz
 - “How we do things around here.”
 - ❖ Marcella Brema



Creating customer service culture

- Make delighting your customers with the service you provide a core part of your department's values and vision ("mission") – what you exist to do and how you should do it.

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Values and Vision

- What we do, and how we do it, matters.

“Ordinary people can accomplish extraordinary things when they believe it has meaning.”

Tom Peters



Our Vision

- Our financial policies, plans and reporting systems help the operating departments achieve their objectives and assure the City's long-term fiscal health.
- Our support of organization-wide information technology resources improves productivity, customer service and public access to City information.
- We delight our customers – both external and internal to the organization – with the services we provide them.

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Our Values

- We are committed to public service, and to the democratic values and human rights beliefs upon which our nation is founded.
- We are faithful stewards of the public resources entrusted to us.
- We show respect for each other and for those we serve.
- We strive for quality in all endeavors and take pride in the results.
- We enjoy our work, our fellow employees and celebrate our successes.

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② Assessing where you're at

- Articulating values and vision (“mission”) is important.
- But there's a difference between saying it and living it.
 - Without action, it just chat.

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Two approaches (undoubtedly more)

- Share one key feature: ask!

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① Taking organization “temperature”

- Annual assessment using values and vision as the benchmark.

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Annual Stakeholders Survey

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city of
san luis obispo

Finance & IT Team: How Are We Doing?

Taking Our Organizational Temperature. On a scale of 1 to 5 (one: excellent; five: awful), how is our department doing in living-out our team values and vision? (Check One)

	1 Excellent	2 Good	3 So-So	4 Not Well	5 Awful
Our Values					
■ We are committed to public service, and to the democratic values and human rights beliefs upon which our nation is founded.					
■ We are faithful stewards of the public resources entrusted to us.					
■ We show respect for each other, for those we serve and for those we regulate.					
■ We strive for quality in all endeavors and take pride in the results.					
■ We enjoy our work, our fellow employees, and celebrate our successes.					
Our Vision					
■ Our financial policies, plans and reporting systems help the operating departments achieve their objectives and assure the City's long-term fiscal health.					
■ Our support of organization-wide information technology resources improves productivity, customer service and public access to City information.					
■ We delight our customers—both external and internal to the organization—with the services we provide them.					

What are the three best things about the department that help us live-out our vision and values?

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What are three things we should change in order to help us better live-out our vision and values?

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Please return your survey to Bill Statler by Friday, November 9. Anonymous is fine.

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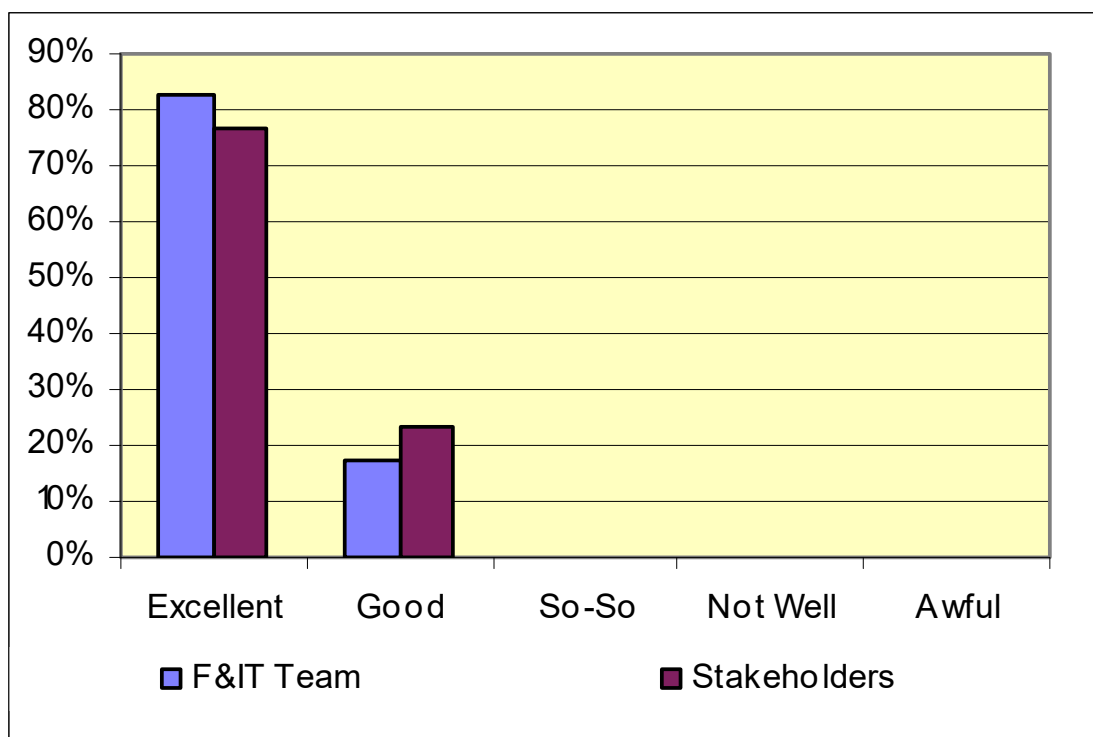
Results: The Short Story

- Results are very similar for F&IT Team and stakeholders.
- In all eight categories, living-out our “values and vision” is ranked as **excellent** by a majority of stakeholder respondents.
- And in virtually all cases, all respondents ranked us as excellent or good.
- About the respondents
 - 18 from Finance & IT
 - 37 from stakeholders
- Sharing the results
 - Provided via email to all Finance & IT members and stakeholders, including all comments verbatim
 - Presented to senior managers and Finance &IT Team

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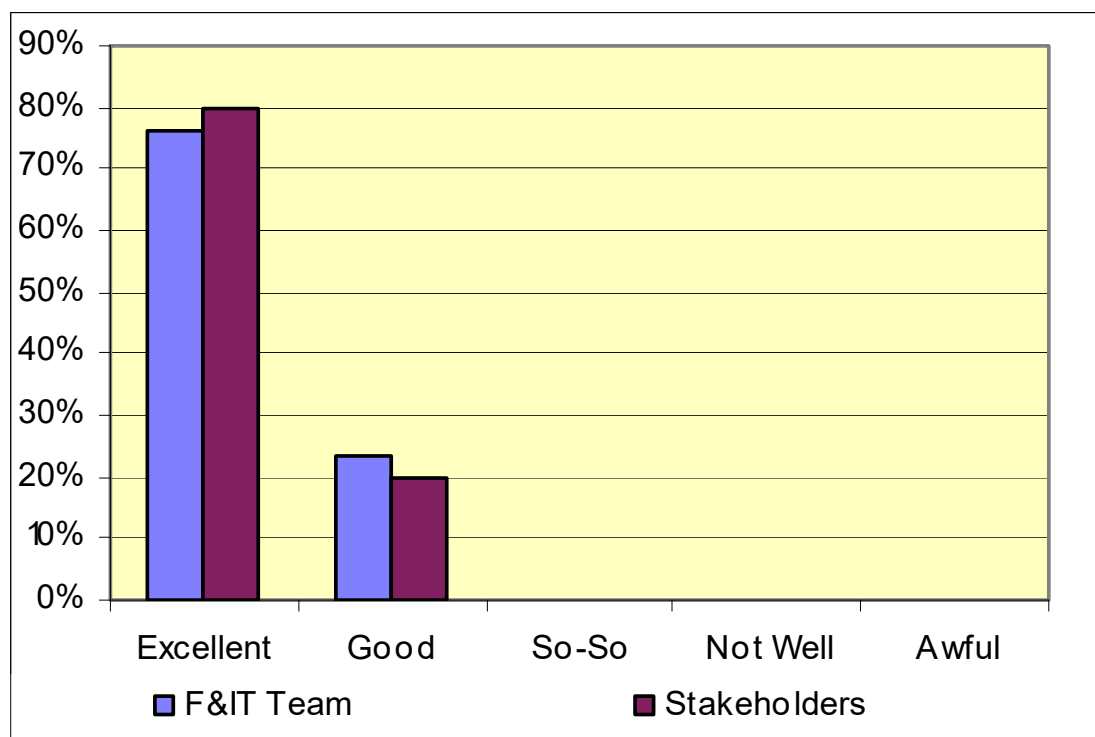
Commitment to Public Service



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Faithful Stewards of Public Resources

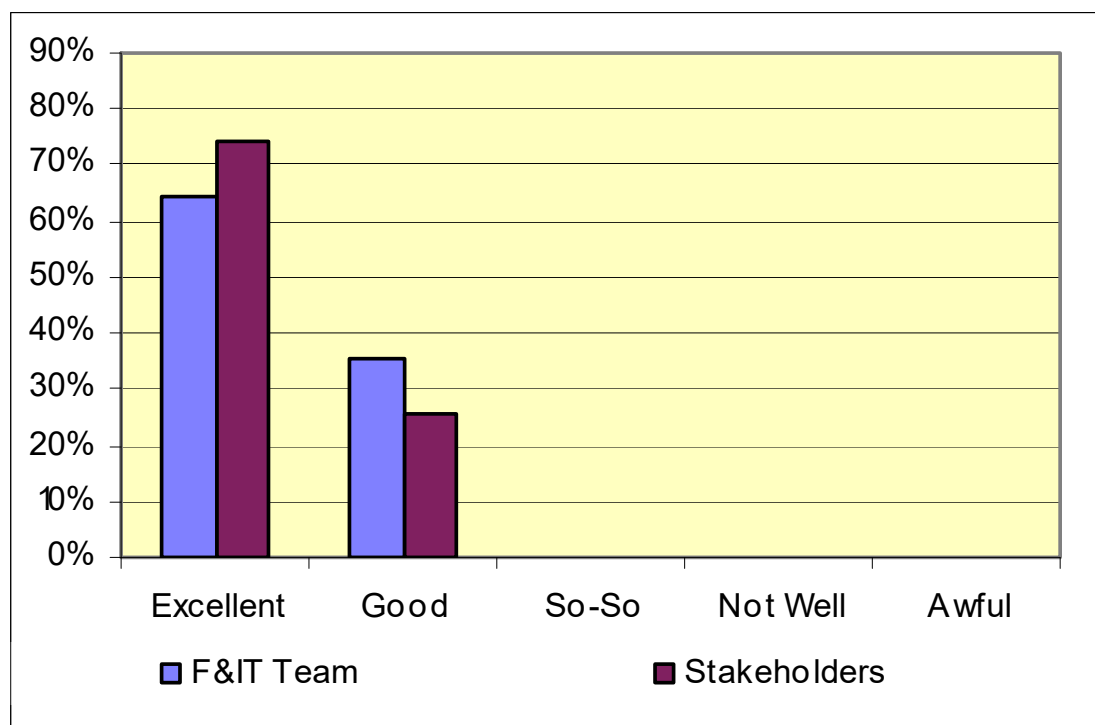


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Respect for Each Other & Those We Serve

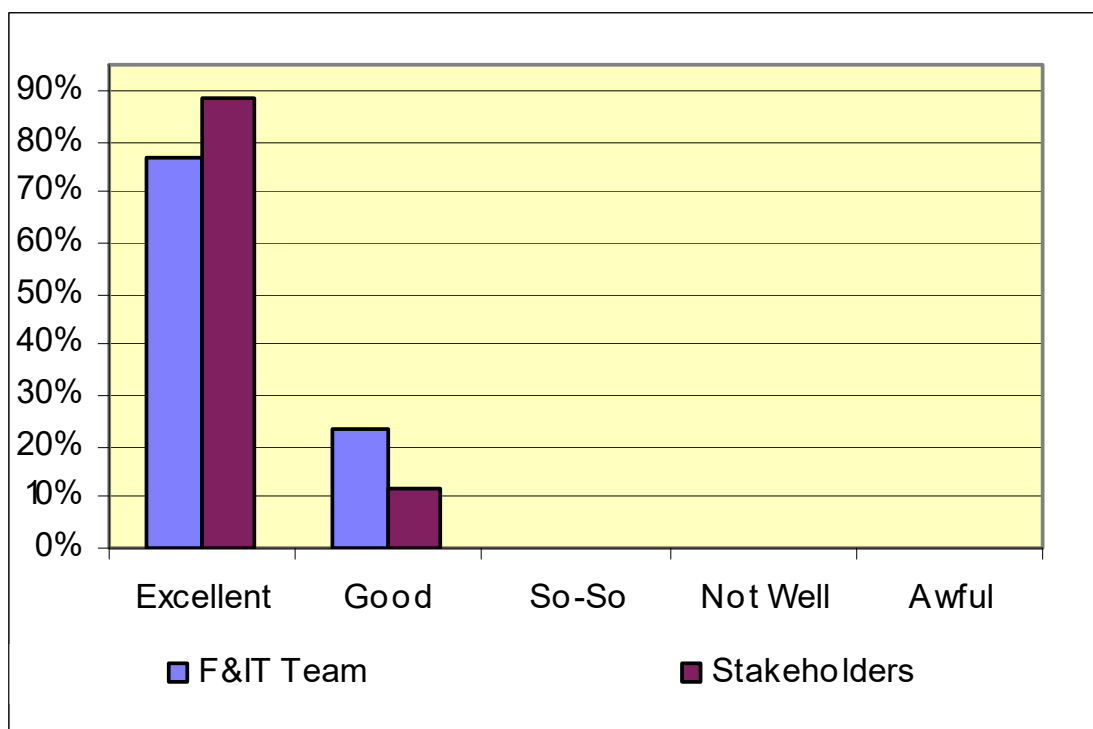


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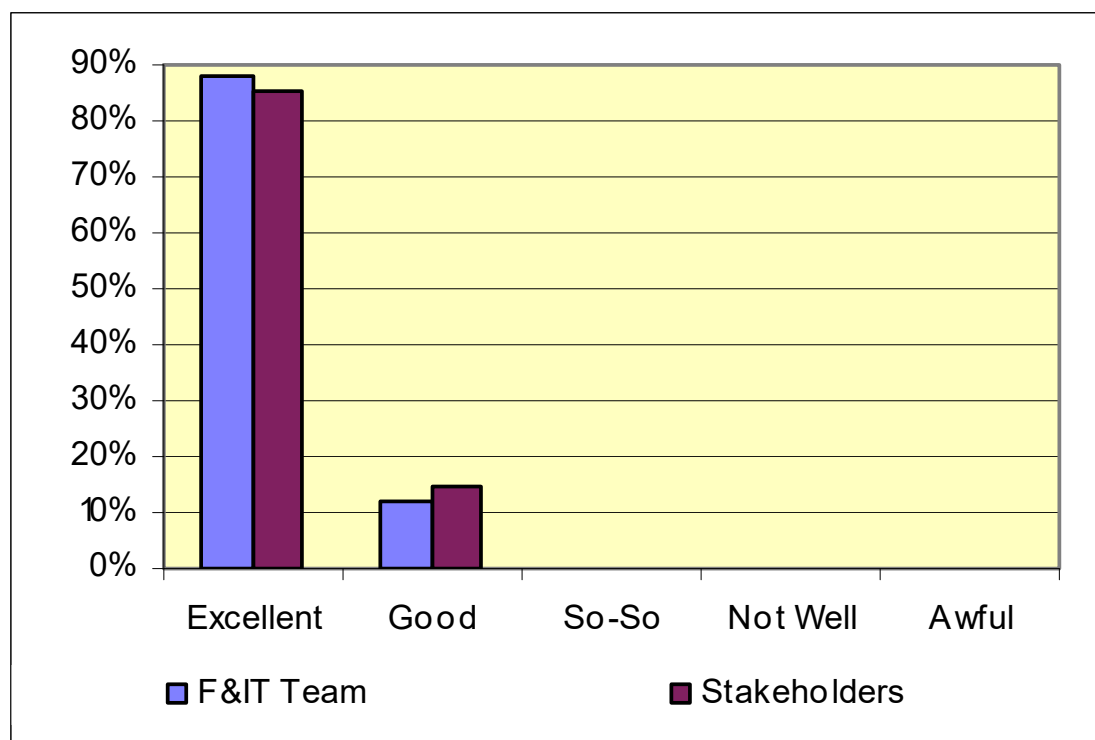
Quality in All Endeavors, Pride in Results



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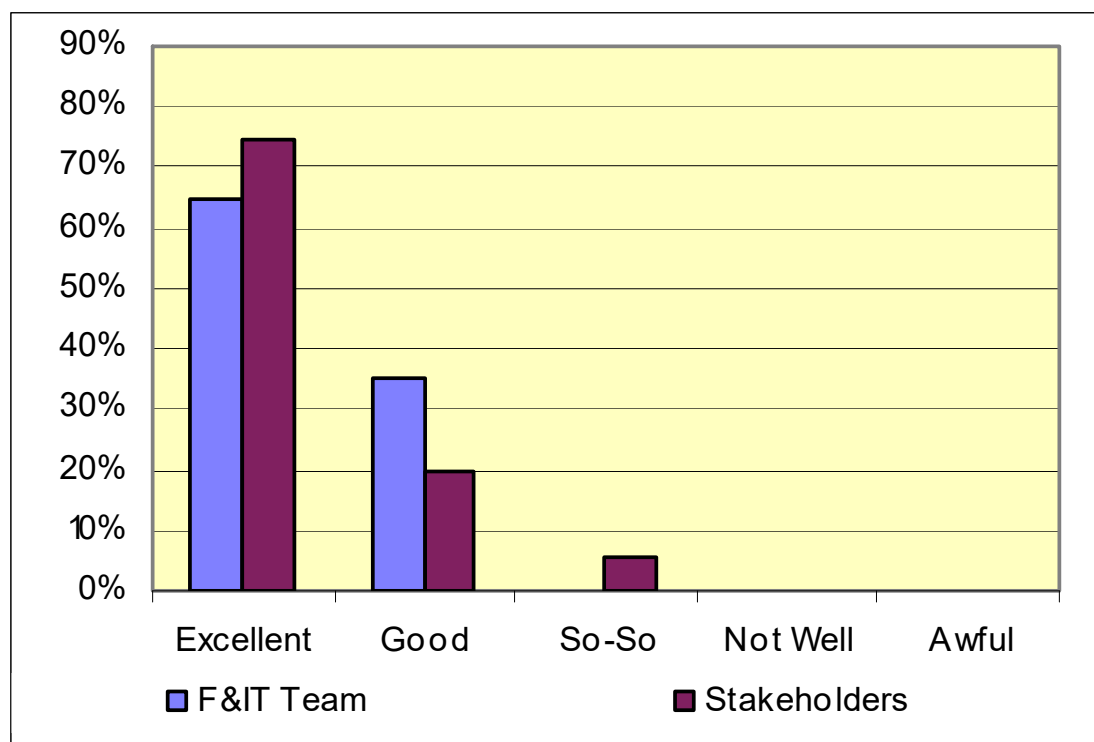
Celebrate Success



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Fiscal Policies, Plans & Reporting Systems

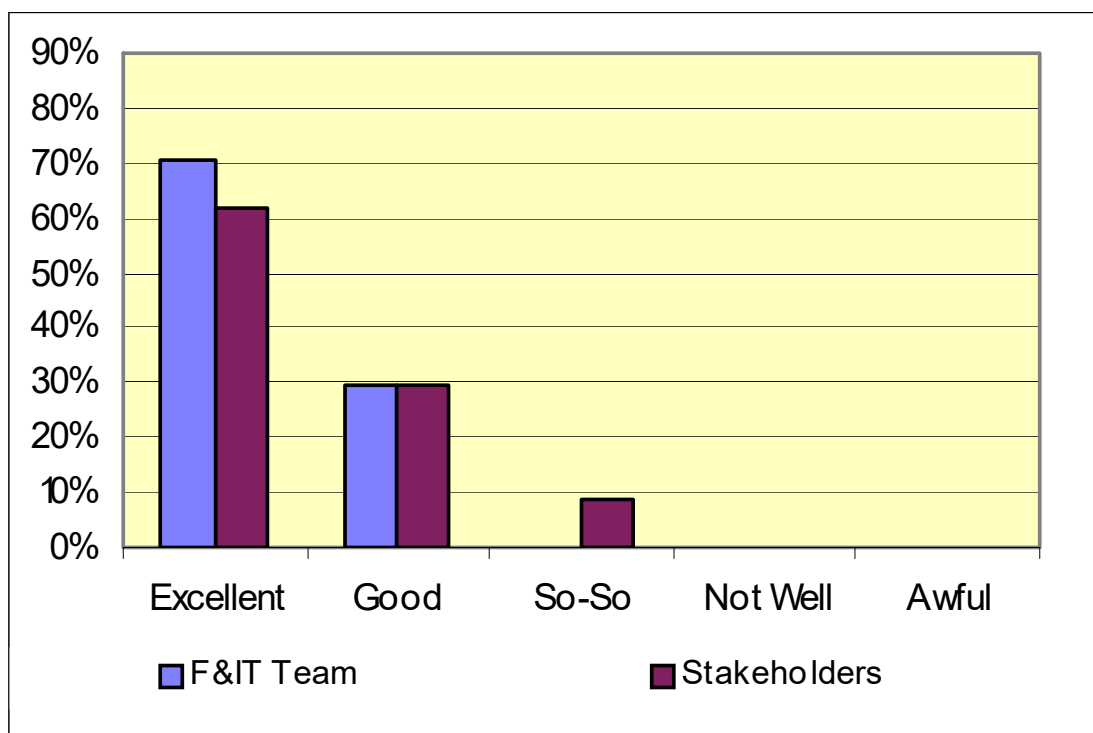


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Technology Support

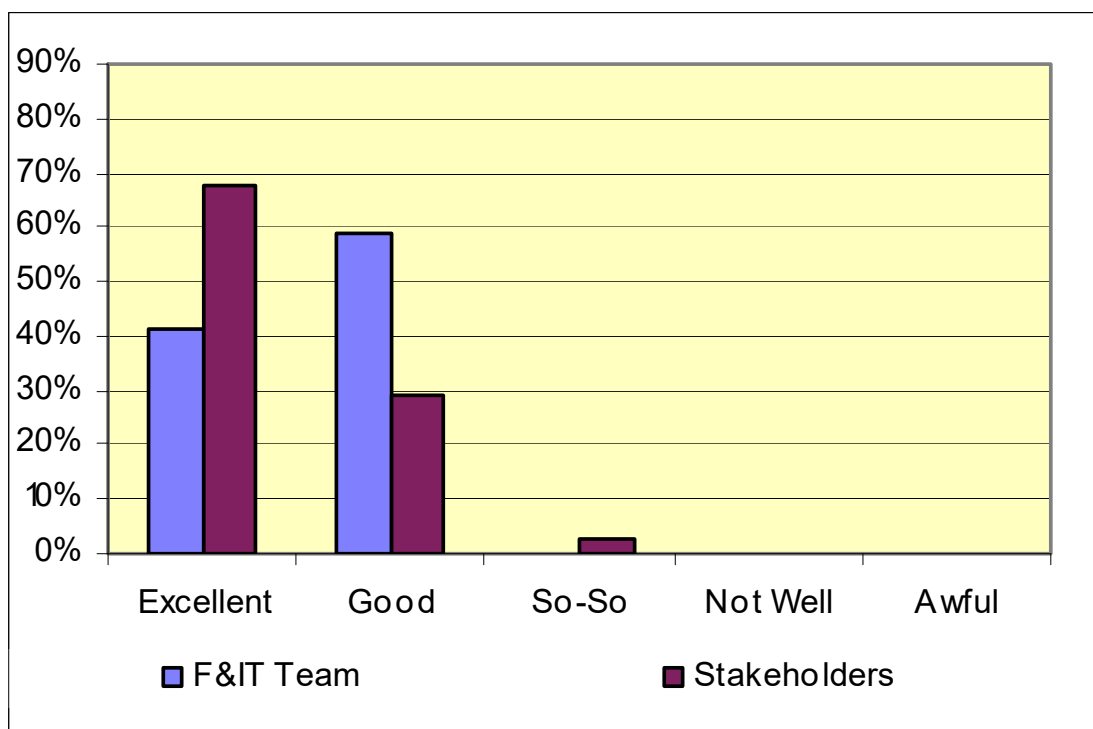


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Customer Service



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Best Things: Top Themes

■ F&IT Team

- Teamwork/Communication (14)
 - ❖ *“Being able to work together to solve problems”*
 - ❖ *“Excellent communication”*
- Valuing employees/recognition (12)
 - ❖ *“Valuing employees and taking time to acknowledge successes”*
- Customer service (7)
 - ❖ *“Customer service is a top priority, both for internal and external customers”*
- Leadership (5)
 - ❖ *“Great bosses”*

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Best Things: Top Themes

■ Stakeholders

- Attitude/Respect (30)
 - ❖ *"Attitude – the best I have ever encountered"*
- Customer Service (29)
 - ❖ *"I get great service from everyone in your entire department and never any grief. So your team is batting 1000"*
- Competence (25)
 - ❖ *"Incredible knowledge base – one I have come to rely on heavily, on both the finance and IT sides"*
 - ❖ *"Creative solutions and problem solving"*

- Financial Mgt/Fiscal Health (8)
 - ❖ *"Developing sound fiscal policies and ensuring other departments understand their responsibilities to sustain fiscal stability as City"*
- Teamwork/Mission (5)
 - ❖ *Your "team spirit" and employee recognition (parties, potlucks, etc.) are top notch, and a model for other departments to achieve*
 - ❖ *Your department works with a common sense of purpose and direction*

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Where We Can Do Better: Top Themes

■ F&IT Team

- Succession planning (7)
- Training (4)
- Staffing (4)
- Rotation (2)
- Relocation (2)

■ Stakeholders

- Staffing/resources (15)
- Simplify procedures (8)
- Technology (5)
 - ❖ Finance systems
 - ❖ Other applications
- Web site (3)
- Rotation (3)
- “Can’t think of a thing” (8)

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Caveats

- That which gets measured is what gets done.
 - So be very sure you're measuring what matters.

No hog ever got fatter just by measuring it.

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② Ask Your Staff

- What do you do everyday that our customers hate?
 - You may be surprised at the things you routinely do to make customers unhappy and likely require significant staff resources to do.
 - ❖ *And your staff know what they are but relentlessly implement them nonetheless.*
 - If the process stinks, maybe we need to change it rather than defend it.
 - ❖ *You can explain anything ...*

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Overcoming Inertia

- Power of Pilot Programs
 - Removes ego
 - Always successful

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③ Rites and Rituals

- Practices, behaviors and “tips” to keep and improve strong customer service culture.

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Some Context

- Easier than you may think because often expectations are so low.
 - Rule readers that are cold and impersonal.
 - ❖ “It’s our policy.”
 - Who lack any sense of humanity, compassion or understanding of their problem.

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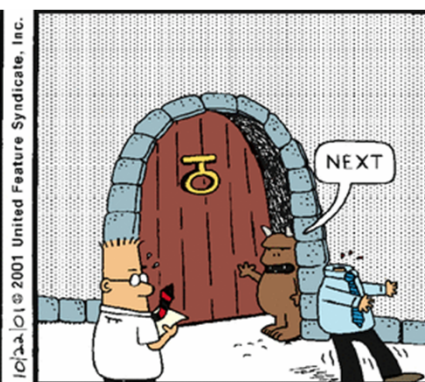
External and Internal Expectations



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External and Internal Expectations



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What they'd like (but don't expect)

- Compassionate staffers who are reasonable (more on this later) and try to understand their problem – and are sincerely committed to solving it a reasonable and quick way.
- With this attitude, almost impossible not to deliver great service.

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It's the process that counts

- We can't always provide exactly what our customers want when they want it.
- So, it's important to remember:
 - Process of service delivery is often more important than the service outcome.
 - Quality service is more than what we do – it's the way we do it.

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To error is human, to correct divine

- When customers have options
 - 15% of complainers will remain as customers regardless of what happens with their concern.
 - But 54% will remain customers if their concern is addressed...
 - And 82% will remain if it's dealt with quickly.

**Even though they probably don't,
treat your customers as if they
have a choice.**

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Five Guidelines

- Listen respectfully
- Resolve quickly
- Respond with courtesy (responding with compassion and humanity is also good)
- Use humor (but never be cavalier or flippant)
- Be reasonable

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Let's talk about "reasonable"

- Yes, we have policies (rules and regulations) that should be followed ... but goal is reasonable and quick.
- Assurance that front-line decisions will be supported.
 - "You are authorized (empowered is the buzz word) to use your own good judgment in resolving customer service issues. You will always be supported in any front-line decision you've made whenever your reason for making it is to provide great customer service."

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“Reasonable”

- Does this mean waiving \$1,500 in water fees if the customer asks for it? **Of course not: that’s not being reasonable.**
- If in doubt, consult with your peers or your supervisor? **Sure.**
- Let your supervisor know if different result (using five guidelines) than rigid interpretation of the rules? **Absolutely.**
- Will you receive advice/direction on handling similar situation differently in future? **Perhaps.**

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Heroism rarely found in a manual



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Tips on Being a Customer Service Hero

■ Rites and Rituals

- 7/11 rule
 - ❖ In first seven seconds of contact, customer forms eleven impressions about you and the agency.
 - ❖ So, make the best of those seven seconds!

● Don't Pass the Buck

- ❖ Customers want prompt (and accurate) responses to their questions and concerns.
- ❖ If you don't know the answer, accept responsibility for finding the person who does.
- ❖ Transfer (if you're sure) or take a message (and take responsibility for getting the right person to call them back.)

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Rites and Rituals

- Smile when you're on the phone
 - Can they see you? Of course not.
 - But smile on your face will come through in tone of your voice.
- Use their name as often as appropriate.
 - Isn't a sweeter sound in English language than our own name.
- Status, status, status
 - Essential to let customers know status of their concerns – even if there hasn't been any progress.
- Taking call for others
 - Avoid asking "who's calling?" Abrupt, implies call may not go through
 - Try "may I tell her who's calling?"

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Rites and Rituals

- Listen, let them talk, don't argue
 - Often upset customers just want to unload – and may not even be upset about specific issue at-hand.
 - So let them talk themselves out, don't argue, let them get their whole story out before responding ... and then ...
- Echo
 - Repeat back what you understand to be their concerns. Serves several purposes:
 - ❖ Confirms you correctly understand their issues.
 - ❖ And makes you appear attentive and sensitive to their concerns (which, of course, you are).

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Rites and Rituals

- Respond to emails right away – even if you don't have an answer.
 - Let's them know they've been heard.
 - Let's them know how request will be handled (time, referral, etc).
 - And status, status, status.
- Is policy/procedure reasonable?
 - Best attitude in the world can't trump a bad product.
 - Direct energies to changing policies and procedures instead of defending them.

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Rites and Rituals

■ Closure

- End contact by simply asking customer if they got what they wanted.
 - ❖ Ensures we delivered service they wanted
 - ❖ Makes you feel better to get direct feedback on what a great job you're doing of giving them what they want.

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Difficult Customers

- These “tips” will result in “delighted” customers most of the time.
- But not always. 😊

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Difficult customer rites and rituals

- Talk calmly in soft voice.
 - Good chance they will turn down the volume, too.
 - You can't get them any calmer than you are.
- Take notes
 - If face-to-face, they can see you're paying attention.
 - And you might need them. 😊

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Difficult customer tips

- Demonstrate empathy.
 - “I understand”
 - “I see”
 - “You could be right.”
- But AVOID saying: “I know how you feel.”
 - Impossible for you to truly know how another person feels.
 - You can only really know how you feel.

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Difficult customer tips

- Offer up to three choices or solutions—then stop.
 - It's okay to set boundaries.
- Involve them in the solution.
 - Ask them what they reasonably would like you to do?
- Don't take it personally
 - Hmmm ... interesting

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Rites and Rituals

- Monthly team meetings that reinforce values and vision
 - Facilitator rotates among all staff
 - Agenda includes speaker (usually outside the department) on current topic, division updates and ...
 - Monthly customer service hero award
 - ❖ Could be an individual, could be a team
 - ❖ Prior month's recipient awards it for next month

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Remember, You Are the Agency

- This means being loyal to organization – to its policies and goals.
 - Will you always personally agree with them? Of course not, and no one expects this of you.
- But we have an obligation to be faithful to process that selects our elected officials and to process they use in making decisions.
- And it means being supportive of our agency and speaking well of Council/governing board members and our fellow employees.

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This also means

- Not sharing with customers (external and internal) things like:
 - “I agree with you – this is the stupidest policy I ever heard of”
 - Or “this is the dumbest thing we ever did”
- This is not “empathy” and won’t result in better service.
- It will only result in a loss of credibility that will make it impossible to provide great customer service.

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Last Thoughts

“The last great freedom is the ability to choose one’s attitude in any given circumstances, to choose one’s own way.”

Viktor Frankl
Man’s Search for Meaning

- Every day, each of us is provided with powerful opportunities to make lives of others we come in contact with better or worse by how we treat them.
- This is simply a decision we make, an attitude we choose.
- So, choose to make someone’s life better (and you’ll be choosing a better life for you, too.)

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Th-th-th-that's all folks!



- For follow-up questions or information, send me an email at:
 - bstatler@pacbell.net

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Questions?



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