

DEVELOPING CUSTOMER SERVICE STANDARDS AND GUIDELINES

The purpose of this activity is to engage participants in developing your agency's customer service standards and behavioral guidelines.

Suggested total amount of time: approximately 45 to 55 minutes (depending on the size of the group)



Directions

- Step 1.** Ask participants to bring the following to the activity (if applicable): executive management's vision for customer service, your agency's practice model, and your agency's statement of values and beliefs.
- Step 2.** Ask participants to write down desired customer service behaviors on self-stick notes (one idea per note).
- Step 3.** Ask the group to post their individual notes on a blank wall. Once everyone has posted their desired behaviors, ask them to group them into categories. Encourage participants to move each other's notes around until they are satisfied they have created good categories. If they move an item more than three times, ask them to duplicate it in one or more categories.
- Step 4.** Ask the group to put the most important behaviors at the top of the notes posted the category. Once they have done this, ask them to name the category.
- Step 5.** Ask the group to write a standards statement for each category.
- Step 6.** When finished with step five ask the group to prioritize the standards. Allow time for discussion about the prioritization and allow opinions about competing priorities to be aired and explored. Ask someone to type up the standards and behavioral guidelines that were developed.
- Step 7.** Debrief this activity by asking the group the following questions:
 - a.** To what extent does this product align with our agency's practice model (or the agency's statement of values and beliefs, if your agency doesn't have a practice model)?
 - b.** Have we addressed all the key standards that are needed?
 - c.** What changes do we want to make in the wording, etc.?
 - d.** What will be our next steps for getting these standards approved and implemented?