

Person-Centered Customer Service Workshop Handbook

Introduction

Person-centered customer service focuses on enhancing individuals' healthcare experience and harnessing our own empathy, compassion and professionalism to reflect back to those we serve. It requires introspection and honest assessment of our organization and culture to improve how we serve by seeing through other individuals' eyes and walking in their shoes. Customer service is a commitment to help and treat others as we would like to be treated along the continuum of the healthcare experience at our organization. This commitment to provide exemplary customer service includes the promise to treat all equally well regardless of our own personal challenges and biases or nature of the situation.

The instructions below provide the necessary guidance to execute a workshop that is tailored to the organization and that builds on the work of attendees to renew their commitment to person-centered customer service and captures the key elements of customer service from within the hearts and minds of attendees. A primary goal of this workshop is to draft a person-centered service charter by utilizing the work of leaders and the attendees.

Early Planning Considerations

Required vs. voluntary: Decide whether employees are required to attend the training or whether it is voluntary. The application of "required" should be equitable and include attendees reflecting all roles at the organization, including clinicians.

It is reasonable to expect that it will take at least eight hours to plan, deliver, and debrief the workshop.

Time for planning and preparing: Three hours plus time to prepare and customize PowerPoint (PPT) slides

Time to deliver workshop: Three to four hours (will differ depending on number of attendees)

Time for post-work and follow-up: Two to three hours

Attendees: Twenty attendees is the maximum recommended with at least six as a minimum

Facilitators: Two facilitators is best, but the workshop can be delivered by one facilitator

Materials: Projector for PPT slides, flip chart paper for walls, stickie notes and markers

Create an Event Summary (30-45 Min)

Leaders and others in the organization will want to know the details of this workshop to help make decisions about where and when to hold the event, who should attend, etc.

See [Event Summary – Sample](#) in the appendices.

Customize to The Organization

Taking the time to customize to the organization and staff demonstrates care and attention, making the workshop more relevant to them. Below are a few ways to do this, but be creative!

Organization Profile (30 min)

Go online to obtain information about the organization, check their website, Facebook page, and/or other sources. Create a short slide that describes their organization, and include any mission, vision or value statements that can help focus discussions and/or act as a touchstone for the workshop activities.

Online Reviews (15 min)

Take time to conduct a search of reviews online. Use the Snipping Tool or other feature to create one slide each for the positive and negative reviews.

Patient Satisfaction Surveys (15-30 min)

Speak to leadership and management to understand the process and frequency for administering patient satisfaction surveys. Obtain key information to use in the workshop. Below is a short guide for gathering information:

- What survey instrument is used (e.g., CAHPS or other)?
- Request a copy of the latest results and incorporate relevant information/data into the slides/material for the workshop.
- Are all patients provided the survey? If not, what is the target population?
- How many patient surveys are administered per year?
- How many are returned?
- How else does the organization seek feedback from patients (e.g., suggestion box, shout out board, comment card, question at check out (e.g., "How was your visit and what could we have done better?"))
- What is the process for reviewing and acting on patient feedback?
- Are patients and families included in reviewing the feedback, making recommendations, or implementing improvements? If yes, provide more details about how this works.

Use the information gathered above to discuss additional opportunities during the workshop to solicit real-time, actionable feedback from patients that will drive efforts to improve customer service and the healthcare services we deliver (e.g., ask patients at check out: "How was your visit? What could we have done better? Is there anyone you want to call out for exceptional service?")

Staff Satisfaction Surveys (15 min)

Ask for the latest staff satisfaction surveys and pull relevant pearls and learnings from the results to emphasize key points. Add this information to PowerPoint slides for the session.

Pre-Work (45-60 Min)

Pre-work can be assigned to both leadership and attendees and should be carefully crafted to have the impact desired. Consider the following:

- Draft the pre-work so that the assignment is very clear, including when the assignment is due and to whom it should be sent once completed.
- Offer a quick call to discuss the pre-work.
- Give respondents at least two weeks to complete the work.
- Send a reminder a few days before the deadline.
- Build in time to provide feedback.

Leadership Pre-Work

The goal is to capture a genuine WHY statement for the organization, especially if it is not clear on the website. This WHY can be included with the mission, vision and value statements (on the PPT slide mentioned above) and will be included in the Team Charter. Additionally, to change behavior there must be a change in the environment; the leadership pre-work challenges leaders to consider three changes they can make to create an environment more conducive to eliciting the behaviors they would like exemplified to enhance customer service. See [Leadership Pre-Work](#) – Sample in the appendices.

Attendee Pre-Work

The Person-Centered Service Survey is a four-question survey that seeks to understand or assess whether:

- The organization's reputation for customer service matters to respondents.
- Work or personal life affects ability to deliver good customer service.
- The organization has a system to obtain and act on patients' feedback.
- The organization partners with patients to improve.

This short and simple survey can be administered (paper or online form) in advance of the workshop with results presented during the session. The drawback with administering as pre-work is that it inserts selection bias and not everyone will submit a survey. An alternate approach is to administer the survey before lunch (or a break) during the workshop and use the lunch break to collate and create a summary slide with results. These surveys can be repeated every six months to track improvements and/or new opportunities for improvement. See [Person-Centered Service Survey](#) in appendices.

Workshop (3-4 Hours)

Specific instructions are included in the notes section of the [PowerPoint](#) slide deck that accompanies this handbook.

Leadership walkabouts – Take brief notes during these discussions and note recurring themes for leadership to consider at a later date; document any commitments that leadership or attendees make and guide them to include “by when” statements.

Sample agenda, role play scenarios, and evaluation form are available in the [appendices](#).

Person-Centered Service Charter (1-2 Hours)

One of the goals of the workshop is to help the employees of an organization develop a charter, outlining their commitment to person-centered customer service. Building on the work completed during the workshop, this should be fairly easy and does not need to be either long or complex. Ideally, this charter can be placed in a prominent area where patients can see it, and it should become the “North Star” to guide how the culture of the organization and the behavior of individuals support person-centered customer service. It is possible to work with attendees in real time during the workshop to complete the charter, especially if it’s a small group. Otherwise, it needs to be completed afterwards, with or without the help of the facilitator.

Post-Work (1-3 Hours)

Plus-Minus-Delta (30-45 Min)

A debrief following the workshop is essential to improve subsequent workshops. Consider using the [PLUS-MINUS-DELTA WORKSHOP](#) in the appendices to guide the debrief session and to capture what needs to change in future iterations of the workshop, especially for those who will be delivering subsequent workshops.

Workshop Work Capture (30-45 min)

Save the flipcharts with sticky notes or take good pictures of them before they are pulled down from the walls for the “Great” and “DOs and DON'Ts” exercises. Type them up for the leadership summary.

Workshop Summary for Leadership (1-2 hours)

If leadership is willing to devote the time, money and resources that it takes to have employees attend a workshop, they may expect a summary to ensure that it was a worthwhile investment. See the [Workshop Summary for Leadership - TEMPLATE](#) in the appendices.

At a minimum the summary should include the following:

- Number of attendees
- Quotes or other highlights from the workshop
- Observations and recommendations – keep these positive
- Person-Centered Customer Service Charter – the plan or timeline for the charter
- Tables or summaries of the “Great” and “DOs and DON'Ts” exercises based on the sticky note capture/write-up
- Evaluation summary/table
- Person-Centered Survey summary
- Leadership Walkabout summary

PDFS of each appendix are included in this document. To download customizable versions in Microsoft Word, use the hyperlinks below.

- [Event Summary](#)
- [Leadership Pre-Work](#)
- [Person Centered Service Survey](#)
- [Agenda](#)
- [Role Play Scenarios](#)
- [Sign-In Sheet](#)
- [Workshop Summary for Leadership Template](#)
- [Plus-Minus Delta](#)
- [Person Centered Service Charter Template](#)
- [Evaluation Form](#)
- [Person Centered Service Workshop](#)

Event Summary – Sample

Workshop title: Person-Centered Customer Service

Workshop description:

This workshop guides participants to co-create a person-centered charter that articulates their ideal state for delivering person-centered service and captures their commitment to professionalism, empathy and connection to the community. The role of the facilitator(s) is to guide participants to derive answers and solutions themselves while the facilitator(s) round out any missing aspects or details. Messaging from leadership will be included throughout the day, and participants will have an opportunity to share with leadership thoughts from the day, ideas for improvement, and requests for support to execute action plans or endorse/support improvement efforts. By the end of the workshop, the goal is to have a draft of an employee co-created, simple charter to codify their commitment to person-centered service.

Workshop objectives:

- Explore our customer service improvement opportunities
- Define value in the context of our work “product”
- Clarify the ideal state of person-centered service – the essentials and opportunities for improvement
- Identify skill sets and winning techniques
- Capture the content for a person-centered charter demonstrating our commitment to outstanding service

Workshop section summaries:

Title	Time
Exploring Opportunities for Improvement	45 min
This section provides the opportunity to list what works well and what needs improvement in our person-centered customer service. After a brief introduction, attendees will form groups of 3-5 and will perform the “Great Exercise” – Is GREAT... What makes our customer service great? GRATES on nerves... What hurts our ability to deliver person-centered customer service? Would be GREAT if... What would make our customer service even better? – followed by a report out by each group and capture of any action items.	
Person-Centered Service and Value	60 min
Groups will define service and value from the patients’ perspective, including defining who our “customers” are. The facilitator(s) will provide broadly accepted definitions of customer service, and the participants will decide on (or at least draft) the definition (the ideal state) to include in their charter. Groups will then list the essentials that must be in place to ensure exceptional and outstanding service that is centered on patients. The facilitator(s) will complete any missing “essentials” during a facilitated discussion.	
Skill Sets and Winning Techniques	60 min
Participants and facilitator(s) will engage in role play and an exercise to help define desired skill sets and “rules of engagement”, which will then be included in the charter. The facilitators will also review the 10-Step Service Recovery Process and emphasize the skills through role play.	
Leadership Walkabouts	60 min
This session offers a facilitated discussion among participants and leadership based on the work completed by the groups. Facilitator(s) will summarize the work, identify next steps and commitments, and secure or request any assistance/changes needed from leadership.	
Wrap Up and Calls to Action	15 min
The facilitator(s) will lead a wrap-up and obtain action plans for: <ul style="list-style-type: none"> • Finalizing the charter • Communicating the charter with the rest of the organization (+/- calls for additional feedback) • Clarifying any commitments from leadership and participants 	

Leadership Pre-Work – Sample

Person-Centered Customer Service Workshop

Leadership Pre-Work –

1. Listen to How Great Leaders Inspire Action| Simon Sinek ~ 20 minutes - [click here](#). Focus on the sections when he talks about the importance of defining your WHY. There will be a lot that is not pertinent to what you do! Just focus on WHY...

Your mission is:

Draft the WHY statement for _____ at _____ and submit to _____ by _____
This should pertain to _____ organization and answers the question: WHY we do what we do at _____? This is not _____ mission statement.
It sounds easier than it is. When your WHY is clear, others can share _____ belief and will bring it to life.

If you need more help, go to <https://startwithwhy.com>. Click on “Find your Why” located in the upper right hand menu.

Examples of WHY statements:

- “To inspire people to do the things that inspire them so that, together, we can change our world.” – Simon Sinek
 - “I like to run.” – sponsored ultramarathon athlete
 - “To make the hard work of improving healthcare easier.” – T. Bearden
 - “To create a better everyday life for the many people.” – IKEA
 - “To give customers the most compelling shopping experience possible.” – Nordstrom
2. If you want behavior to change, you have to change the environment. What are three changes that leadership can make to the organizational environment to foster better customer service?
Examples include:
schedule an hour per week to leave your office and go talk to frontline staff; create a shout out board for patients to comment on outstanding service; plan meals where staff and leadership eat together (fostering stronger culture and sense of family).

Send your three awesome and impactful changes to _____ at _____ by _____

Person-Centered Service Survey

This short survey seeks to understand how important person-centered care is to our organization and to each of us individually. Person-centered care can be described as healthcare service delivery that is focused on each individual's healthcare needs. Excellent customer service, delivered in a professional manner with compassion and understanding, is a key component of person-centered care that is often overlooked. The survey also seeks to establish the degree to which patient feedback is sought and acted upon, and the degree to which the organization partners with patients in meaningful ways to improve the patient experience.

Circle the number along the scale that best matches your response with 10 representing STRONGLY AGREE and 1 representing STRONGLY DISAGREE.

1. Our organization's reputation for professionalism and outstanding customer service in our community matters to me.

1	2	3	4	5	6	7	8	9	10
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STRONGLY DISAGREE

STRONGLY AGREE

2. There are work or personal life pressures that affect my ability to always be professional, polite and compassionate.

1	2	3	4	5	6	7	8	9	10
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STRONGLY DISAGREE

STRONGLY AGREE

If your score on question 2 is greater than 6, are you comfortable sharing what needs to change?

3. We have a system to obtain timely feedback from patients during their visit that we use to improve the patient experience, including our customer service.

1	2	3	4	5	6	7	8	9	10
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STRONGLY DISAGREE

STRONGLY AGREE

4. We partner with our patients to improve the patient experience, including our customer service.

1	2	3	4	5	6	7	8	9	10
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STRONGLY DISAGREE

STRONGLY AGREE

Agenda – Sample

Person-Centered Customer Service Workshop

Workshop objectives:

- Explore our customer service improvement opportunities
- Define value in the context of our work product
- Clarify the ideal state of person-centered service – the essentials & opportunities for improvement
- Identify skill sets and winning techniques
- Capture the content for a person-centered charter demonstrating our commitment to outstanding service

Session:
Welcome and introductions
Exploring Opportunities for Improvement <ul style="list-style-type: none">• List what we do great• Explore what gets in the way of doing great• Identify changes to improve
Person-Centered Service and Value <ul style="list-style-type: none">• Define service and value from the patients' perspective• List essential elements for outstanding, person-centered service
Break –
Skill Sets and Winning Techniques <ul style="list-style-type: none">• Practice skills and techniques• Master the 10-Step Service Recovery Process• Define “rules of engagement”
Leadership Walkabouts <ul style="list-style-type: none">• Summarize the day's work• Identify next steps and commitments• Partner with leadership to secure or request assistance/changes
Wrap Up and Calls to Action <ul style="list-style-type: none">• Identify action plan to finalize and communicate charter with the rest of the organization (+/- calls for additional feedback)• Clarify any commitments from leadership and participants

Role Play Scenarios

Role Play Guidance Sheet

As we go through the training today, please keep a couple of things in mind. It is easy to provide good customer service to those whose value systems are like our own and who we believe deserve good customer service, but what about those who are different from us or whose value systems are different?

When we find ourselves blaming patients for behaviors that are symptoms of their illness – “If you would only lose some weight!” or “Good grief! It’s you again!” – it’s hard to provide them with the customer service they need and deserve.

Role Play 1

A customer is standing at a counter waiting for someone to notice them. The employee is looking down at something on the desk and doesn’t look up. The customer waits a couple of minutes and then says, “Excuse me...” Before the customer can finish her sentence, the employee holds up her hand as if to say – “talk to the hand” but doesn’t give the customer any eye contact.

Questions – As a customer how would this make you feel? How trusting of the organization would you be after an experience like this one?

What could the employee have done differently?

What if the work the employee was working on was detail-oriented, and she needed to get through a column and then she would help the customer? What could she have done?

Role Play 2

You work in the billing department. Your phone rings and it is someone from the emergency department (ED) saying, “I have an irate patient on the phone for you – here you go!”

You answer and indeed find an irate patient. The patient is mad because this is the third time he has been transferred, and no one can help him. He is trying to get information about a bill that he believes he has already paid. What makes it worse is that the statement he got today said his account was going to be turned over to collections as a bad debt.

The patient will not let you get a word in edgewise and just complains about how bad the hospital is at billing. You become defensive, and the patient begins to curse; you tell him if he curses again you will hang up on him. Of course he curses again and you hang up.

Questions: How could the ED personnel have handled the call better?

How could you have handled the call better?

When your caller calms down, you look up his account and he has paid the bill, and to make it worse, it was a bill for his wife who recently died. What do you do now?

Evaluation Form – Sample

Workshop Evaluation

Person-Centered Customer Service Workshop

Please rate your agreement with the following statements.	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The workshop objectives were met.	1	2	3	4	5
The information presented was relevant to my job.	1	2	3	4	5
	If information was not relevant, what would you change to make it more relevant?				
The information presented provided new ideas or information that I will use.	1	2	3	4	5
	List one thing you will change as a result of the workshop.				
I am more confident our organization can improve our person-centered service.	1	2	3	4	5
The facilitators were knowledgeable and well-prepared.	1	2	3	4	5
I would recommend this workshop to other organizations.	1	2	3	4	5
	If you would not recommend this workshop, why not?				
	What could we have done better today?				

Plus-Minus-Delta Worksheet

Use the PLUS and MINUS columns to enter what went well or poorly during the session. Enter changes we will make in the DELTA column.

Plus	Delta
Minus	Delta
Other Deltas Not Linked to a Plus Or Minus	

Workshop Summary For Leadership – Template

Person-Centered Service Workshop - Summary:

Quotable

Person-Centered Customer Service Charter

Recommendations

Working on GREAT

Is GREAT... What is the one thing about us that makes our customer service great?	
GRATES on nerves... What is the one thing that hurts our ability to deliver person-centered customer service?	
Would be GREAT if... What is the one thing I would like to see change that would make our customer service even better?	

Workshop Summary For Leadership – Template

The DOs and DON'Ts of Person-Centered Customer Service

We all know what to do and what not to do. The approach of this workshop is for the participants to outline and list the elements from their own knowledge, experience and insight. The table below reflects all of that work.

There are common themes, and these were used to draft the Person-Centered Customer Service Charter.

THE DOs	THE DON'Ts
<ul style="list-style-type: none"> • Introduce yourself • Treat them like family • Acknowledge them • Think before you speak • Use layman's terms 	<ul style="list-style-type: none"> • Use sarcasm • Be short or rude • Be negative • Dismiss • Argue

Leadership Walkabout

Workshop Evaluations

The scale for the questions was 1-5 (strongly disagree, disagree, neutral, agree or strongly agree).

N =

Item	Mean	Median	Mode	Min	Max
The workshop objectives were met.					
The information presented was relevant to my job					
The information presented provided new ideas or information that I will use.					
I am more confident our organization can improve our person-centered service.					
The facilitators were knowledgeable and well-prepared.					
I would recommend this workshop to other organizations.					
List one thing you will change as a result of the workshop.					

Workshop Summary For Leadership – Template

Person-Centered Survey

The scale for the items was 1 (strongly disagree) – 10 (strongly agree).

N =

Item	Mean	Median	Mode	Min	Max
The organization's reputation for professionalism and outstanding customer service in our community matters to me.					
There are work or personal life pressures that affect my ability to always be professional, polite and compassionate.					
We have a system to obtain timely feedback from patients during their visit to our organization that we use to improve the patient experience, including our customer service.					
We partner with our patients to improve the patient experience, including our customer service.					

Person-Centered Service Charter - Template

Person-Centered Service Charter

Our Commitment
Our Vision of Person-Centered Service
Our Promise to Each Other And Those We Serve