

Customer Service First Internal Campaign

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Division 1: Communication Management / **Category 9** – Employee/Member Communication

Description: The Customer Service First Program was an internal communication campaign to motivate and engage employees in the bank's enhanced customer service philosophy. It was designed to be an educational as well as entertaining vehicle to launch the bank's renewed commitment to a customer service focused environment.

Need/Opportunity / Park Federal Savings Bank is a small traditional community bank that was facing poor earnings and declining deposits. The president requested the implementation of sales quotas to acquire new accounts. This would be a dramatic change for the front-line staff who was accustomed to a predominantly "order-taker" versus sales environment. I began work with the Retail Manager on a sales training program.

Formal Research / I interviewed all 30 front-line staff (tellers and customer service representatives) and four branch managers. My objective was to collect any current best practices to incorporate into the sales training program. What quickly emerged was a greater need to be addressed. Of the 34 interviewees, 85% reported they felt administrative support services (accounting, IT, operations) and senior management did not put customers first and did not provide help when requested. 71% stated this negatively affected their customer service attitude. 74% expressed their belief that additional product knowledge would help them service customers. Most disturbingly, 100% expressed their efforts went unrecognized and unrewarded.

Informal research / My own observations supported many of the interview results. On several occasions, I had seen employees rebuked when seeking answers to customer questions if the manager was in a meeting or busy with a project.

In my estimation, ***the overwhelming need was to communicate and create a renewed commitment to quality customer service and provide recognition to employees who deliver it.*** I met with the President regarding my concerns and research findings. I strongly urged that we address this problem before attempting to implement sales quotas. With his approval, I began the development of a strategy and plan that would engage, educate, and empower all employees.

Intended Audience(s) / The audience was all bank employees further broken down into three sub-audiences. While each had unique key messages, all communication was under the umbrella of (a) the customer comes first, (b) employees are our greatest asset, and (c) we are all in this together:

- Management (includes all from branch managers to president) – *Key message:* We must lead by example making customers the number one priority and offer assistance to employees as requested.
- Front-line staff (includes tellers and customer service representatives) – *Key message:* Management will provide the education and assistance you need to best serve the customer.
- Administrative staff (all "back-office" staff including accounting, IT, Human Resources) – *Key message:* A focus on excellent customer service is not just for front-line employees. If you are not directly serving the customer, you are helping someone who is.

Goals and Objectives / My communication goals were to express our renewed commitment to putting customers' needs first and to emphasize that employees are the most important element of our success. It was also to dispel the notion that customer service was a concern for front-line employees only.

I would initially be measuring employee behavior through participation levels in the contests, weekly quizzes, and YouTube views (tactic details are provided in next section). This would help me monitor employee engagement which was essential to communicating the messages. I also randomly met with employees throughout the campaign to get feedback on the content of the program and adjust quiz/question topics as needed. I would be measuring end-of-campaign results with an employee online survey (Survey Monkey) which asked employees to compare changes in their attitude, knowledge of products, and commitment to customer service in a "before and after" style format. Influenced by the degree of negative feelings, I set an objective of a 67% positive response in each category.

Solution Overview / My solution was to develop a Customer Service First internal campaign as a launch to on-going programs. It would involve educational and fun elements to engage employees in the process of learning about products and customer service techniques. It was also designed to constantly emphasize the importance employees held in the success of the bank and how we would all work together to make this happen. I was the project lead and responsible for the strategy, plan, and implementation. I received technical or product knowledge support from various managers in the production of some tactics and program materials.

Tactics / If the tactic was to continue past the initial launch, it will be noted as on-going. All contests and programs (unless noted) were for non-management employees. I wanted the focus and attention to be on employees, with management acting as coaches and counselors:

- a) Customer Service Quiz and Customer Service Question of the Week –Two winners each week (one from each category for six weeks) were chosen from all correct submissions. The winners received a \$25 gift card. The quizzes and questions were designed to engage and educate employees about product/services and customer service techniques. The quiz and question were billed as "open-book" with employees encouraged to visit our website, look at brochures, and/or ask managers to review their answers. The expressed purpose was to learn and be better equipped to help customers.
- b) Employee Shining Star Commercial Contest – This contest called upon motivated and creative employees to produce an internal commercial highlighting the shining star service Park Federal employees provide. They could focus on one employee, spotlight a certain department, or bring attention to a branch. Employee directors were each given a flip recorder for their use and to keep upon acceptance of their entry. The winner would receive a \$250 award.
- c) New Bank Slogan Contest - This contest called for employees to create a new bank slogan to better reflect our *Customer Service First* focus. The new slogan would be used in our advertising and other media to communicate our dedication to providing quality customer service. The winner would receive \$500.
- d) Employee Recognition Program (on-going) – The employee "Star Search" program was developed to recognize and reward employees for providing exceptional customer service. The Star Search logo and theme were developed to support the importance of employees in the customer service process.

- e) Customer Comment Boxes (on-going) – “Your Two Cents Worth” comment boxes and postage-paid postcards were installed in each lobby to encourage customer comments, compliments, and complaints. This low-technology but highly effective approach would give us an opportunity to engage with customers and quickly correct any customer dissatisfaction.
- f) Customer Service Online Training (on-going) – Every employee (even the president) completed online training. Modules provided instruction in customer service techniques. It was important for all employees, especially back-office staff and managers, to complete the training to further emphasize that we all are involved in the customer service process.
- g) Grand Finale/Employee Social – To mark the end of the six-week campaign and announce the commercial and slogan contest winners, we had a special celebration (off-site with dinner, drinks, dancing) with an Academy Awards theme.

The following delivery methods were chosen to best engage employees and facilitate communication with management staff.

Delivery Methods and Timeline

- a) Management “Mingle” and Campaign Overview (Tuesday, July 13, 2010) – The management staff was brought together to hear the details of the six-week campaign, on-going customer service focus, and their role as support and counsel for staff. The president spoke on our renewed philosophy while I delivered a PowerPoint presentation on the campaign specifics. It was important for managers to understand the program to best answer their employees’ questions.
- b) Employee Appreciation Day/Program Launch (Friday, July 16, 2010) – The president and I travelled to each office to present program details to employees. In addition to lunch on the bank, employees received a gift of a 2G flash drive in the shape of a key along with the message, “You are the key to our success!” The flash drive was loaded with the program’s calendar of events, rules and deadlines for the contests, plus instructions for completing the online training. I felt it was important to have in-person meetings with the president to show his support of the program and build a connection with staff he rarely sees.
- c) Customer Service Quiz and Question of the Week (began Monday, July 19, 2010) – The quizzes and questions of the week were sent by me each Monday morning for six weeks via email. The quizzes were attached to the email. The questions were accessible via a link to YouTube and presented by a different senior level manager each week. This was an additional way to engage employees with managers.

Implementation and Challenges / I received tremendous support from the president during the implementation of this program. He listened to my counsel when I told him he needed to be the “face” of this campaign to properly communicate the importance of this program to the bank. The other managers were also very cooperative when asked for help in preparing the quizzes and questions of the week. The only push-back I got was minimal and came from one “camera-shy” manager (who later graciously agreed to do the YouTube video).

As I monitored the responses to the weekly quizzes and YouTube views of the weekly questions, I saw a 20% drop in participation during week three of the program. Since it was critical to have employees participate to learn, I made three changes to recapture the initial enthusiasm. I began re-sending the original weekly emails with a reminder about that week’s deadline. I also spoke with the branch managers and supervisors about encouraging their employees to enter and offering to assist them with the contests. Last but not least, I changed the contest prizes to include four hours of time off with pay. These changes kept participation at

or near week two's level of 78% for the remainder of the six-weeks. We were never able to recreate the 95% participate level of week one, which I believe reflected initial curiosity and the novelty of the program.

Budget / Approved Budget (\$X); Actual Budget (\$X) - The program, logos, and all content were created internally so there were no outside agency or consultant fees. The Grand Finale was incorporated into a planned employee social event, the online training was available under an existing contract, and there were no initial costs for the employee recognition program so no cost for these elements were attributed to the campaign. The additional prizes of time off with pay were a soft-dollar expense so we did not adjust the budget and accounted for only the hard costs of the gift cards. The flip recorder actual expense was nearly double the estimate due to a higher than anticipated participation in the commercial contest. However, this additional expense was greeted with enthusiasm by the president because he was very pleased with the demonstrated employee excitement and positive attitudes.

Measurement and Evaluation of Outcomes / My informal interviews with employees and managers demonstrated a predominantly positive attitude toward the campaign. Comments indicated employees were learning, felt more comfortable with our products, and had a more positive attitude overall. The most heart-warming responses came from employees who entered the commercial and bank slogan contests. Listening to them express their views on customer service was extremely motivating. I compiled these quotes, shared them with the management staff, and also incorporated them into the Grand Finale PowerPoint presentation.

The employee online survey was sent the day after the Grand Finale. While secretly hoping for a 100% positive response in each category, I was pleased to see my objective of 67% was exceeded. Though I had met my objectives, I realized the real work was about to begin. All employees, especially management, needed to sustain this positive attitude and commitment to quality customer service to ensure the bank's success.

Results / Online survey – 52 employees (87% of staff)

Respondents were instructed to answer as compared to before campaign:

<u>Question</u>	<u>Increased</u>	<u>Same</u>	<u>Decreased</u>
Knowledge of products and services	73%	27%	0%
Knowledge of customer service techniques	77%	23%	0%
All employees are responsible for serving the customer	92%	6%	2%
I am motivated and committed to serving my customers	77%	23%	0%
Employees will be recognized/rewarded for excellent service	88%	8%	4%
Quality customer service is a priority for the bank	71%	19%	10%