

# Chapter 49

## Bringing Service Standards to Life

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### **ABSTRACT**

*This case study describes the efforts of performance consultants to improve the extent to which staff and volunteers at a nonprofit agency performed according to their customer service standards. After providing background information about the organization and its service standards, the case study describes the existing performance gap regarding the standards and the consultants' response to the client's initial request for training. The case study describes the performance analysis the consultants conducted, including the gap analysis, organizational analysis, environmental analysis, and cause analysis. The case study also describes the task analysis that the consultants conducted using the critical incident technique. The case study concludes with a description of how the consultants created the resulting training, and the effect of the training on the sponsoring organization.*

### **ORGANIZATION BACKGROUND**

Founded in 1972, the Teddy Bear Foundation (a pseudonym) is an international non-profit organization that provides temporary accommodations and financial support for families with a family member suffering from critical illness. The Foundation consists of a network of over 300 chapters, known as Dens (a pseudonym), which are located in various countries around the world. Guests are weary, emotionally taxed, and under extreme stress. The goal of a Den is to give support to these caretakers in their time of need.

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Opened in 1988, the local Den is run by 13 paid staff and supported by 30 regular volunteers from the surrounding community. The Den may house up to 19 families at any given time. It provides private rooms, laundry facilities, meals, and other amenities. Families staying at the Den come from a variety of economic, social, and ethnic backgrounds. Guests may stay at the Den for anywhere from a few days to several months, depending on the length of their family members' hospital stay. To serve them, the Den ensures that two to four staff members and three to four volunteers are present each day.

This Den's leadership team consists of Daniel (Executive Director), Sarah (Director of Operations), and Kaitlyn (Volunteer Coordinator). They manage and direct the strategic and daily functions of the Den. Each has worked there for three to four years. In addition to the core leadership team, the Den also employs five weekend managers and one night manager. The managers watch over the property and tend to guests during non-business hours.

Working together, employees and volunteers support guests by answering questions, accommodating special requests, and providing necessary assistance. They serve on the Den's front lines to provide services to the guest families. Among other duties, volunteers check in and orient guests upon arrival. Volunteers also prepare meals, stock supplies, clean guest rooms, and perform light maintenance around the premises. They answer guest questions and provide a helping hand as guests share their needs and concerns, in many ways, acting as concierges. Many volunteers have been contributing their time and efforts at the Den for over ten years; they have the most interaction with, and act as the primary source of support for, the guests who stay there.

From a performance standpoint, these mission-critical interactions are *incredibly complex tasks* (Wulfek & Wetzel-Smith, 2010). This knowledge work involves dynamic communications under complex conditions that are often unpredictable and novel. These interactions are highly variable and involve families dealing with high levels of stress, ambiguity, and uncertainty. Conversations can be emotionally charged and uncomfortable.

## **SETTING THE STAGE**

Recently, the Foundation's international leadership directed all Den executive directors to push for excellence by improving customer service and fostering appropriate conduct by Den staff and volunteers. Daniel met with Kaitlyn and Sarah to discuss this directive and plan how they might fulfill it within their Den. Collaborating with key staff and volunteers, they developed a list of service standards for the Den. These standards provided staff and volunteers with a framework for appropriate conduct and engagement with guests and each other in this stressful environment. The standards consisted of behavioral statements grouped into four categories: Professional, Respectful, Compassionate, and Helpful. Table 1 provides examples of corresponding behavioral statements within each category of the service standards.

A few months after implementing the standards, Den leadership decided to collect data describing how well the standards were working. In formal meetings and informal individual conversations, staff and volunteers confidently reported that they met these service standards. However, leadership observations and a guest satisfaction survey indicated that guest services still needed improvement. Staff and volunteers were sometimes rude and judgmental. At other times, they were insensitive toward guests' backgrounds, situations, and needs.

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