Customer Service:
Leadership Issues & Culture

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How can leadership guide employees to provide world-class Customer Service?
What is Leadership?

“Leader is a label we give to an individual who holds a vision and courageously pursues that vision in such a way that is resonates with the minds and hearts of people.”

- Richard Barrett

*The Seven Levels of Leadership Consciousness*
Evolving Leadership

A. Leading self
B. Leading others
C. Leading to provide World-Class Customer Service

Source: Beth Kanter
Emerging Leaders
Leading Self

“To lead others, you must be able to lead yourself”

Source: Beth Kanter
Emerging Leaders
The Basics: Knowing your **Personal Values**

Essential component of developing leadership skills is a strong sense of self

- What are your personal values?
- They reflect what is important to us
- They describe our individual motivations
- Together with our beliefs, they are the causal factors that drive our decision-making
## Core Values Example

<table>
<thead>
<tr>
<th>Core Value</th>
<th>Belief</th>
<th>Behaviors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrity</td>
<td>Honesty</td>
<td>Practice full disclosure (even about failures); clear communication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Do not practice back stabbing</td>
</tr>
<tr>
<td></td>
<td>Trustworthiness &amp; Consistency</td>
<td>Keep commitments; follow through</td>
</tr>
<tr>
<td></td>
<td>Clear Standards</td>
<td>Clearly state behaviors (positive and negative) and consequences</td>
</tr>
<tr>
<td></td>
<td>Responsibility &amp; Dependability</td>
<td>Use information to address, not manipulate, issues</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Step up to the plate and own issues</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Show up at work; be engaged</td>
</tr>
<tr>
<td></td>
<td>Fairness &amp; Equality</td>
<td>Encourage trust among employees, management and public</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Treat all employees fairly and equitably</td>
</tr>
</tbody>
</table>
List of Values

https://survey.valuescentre.com/survey.html?id=s1TAEQUSlmyFGafKLmkogR4E3lsuZOgBIY H5ne6nQBpXlb8N91MbJw&locale=en_USs

Accountability
achievement
adaptability
ambition
balance
(home/work)
being the best
caring
clarity
coaching/
mentoring
commitment
community
involvement
compassion
competence

conflict resolution
continuous learning
courage
creativity
dialogue
ease with uncertainty
efficiency
enthusiasm/positive attitude
entrepreneurial
environmental
awareness
ethics
excellence
fairness
family
financial stability
forgiveness friendship

future generations
generosity
health
humility
humor/ fun
independence
initiative
integrity
job security leadership
listening
making a difference
openness
patience perseverance
personal fulfilment
personal growth
professional growth

recognition
reliability
respect
risk-taking
safety
self-discipline
teamwork
trust
vision
wealth
well-being (physical/
emotional/ mental/
spiritual)
The Basics: Understanding Leadership Styles

Birkman Leadership Style Grid

- Extrovert
  - DOER
  - COMMUNICATOR
- Introvert
  - ANALYZER
  - THINKER
# The Birkman Leadership Style Grid

**Interests:** What you like to do.

**Usual Behavior:** Illustrates usual behavior when individual needs are met. Shows strengths and most productive behavior.

**Needs:** Defines the ideal environment and the ideal task demands, but we can and do learn to adjust and deal with situation that clash with our needs.

**Stress Behavior:** Behavior resulting from stress when needs are not met.

*Birkman Leadership Style Grid*
The “Doer”
Deals in the present
Gets results through action

**Interests:** Building and craftsmanship, technical work, solving practical problems, working outdoors

**Usual Behavior:** Active, decisive, practical, assertive, friendly

**Needs:** Action and a busy schedule, practical solutions, assertive communication, clear-cut situations

**Stress Behavior:** Becomes impatient, dismissive of others’ feelings, verbally domineering

**Stress Tips:** Show concrete benefits, give firm directions, provide action-oriented solutions

*Birkman Leadership Style Grid*
The “Communicator”
Deals in the *present* 
Gets results through *people*

**Interests:** Selling & persuading, helping people, promoting products or ideas, motivating & inspiring

**Usual Behavior:** Responsive, enthusiastic, flexible, social, assertive, competitive

**Needs:** Flexibility, competition, a variety of tasks, group interaction, individual approval, defined authority

**Stress Behavior:** Becomes distracted & argumentative, disregards the plan, mistrusts others

**Stress Tips:** Talk out problems face-to-face, personally praise good work

*Birkman Leadership Style Grid*
The “Analyzer”

Deals in the past

Gets results through systems

**Interests:** Developing processes, working with numbers, scheduling activities, analyzing details

**Usual Behavior:** Consistent, focused, cautious, insistent, orderly, selectively social

**Needs:** Time alone to concentrate, consistency, detailed directions, systems & processes

**Stress Behavior:** Resistant to change, overly insistent on rules, reluctant to discuss problems, withdrawn

**Stress Tips:** Outline rules & define goals, be cooperative when problem solving

*Birkman Leadership Style Grid*
The “Thinker”
Deals in the future
Gets results through ideating

**Interests:** Visual design, reading, writing, editing, creating, listening to music, brainstorming & ideation

**Usual Behavior:** Reflective, suggesting, expressive, insightful, selectively social

**Needs:** Time for reflecting, to not feel overscheduled, outlets for emotion, one-on-one communication

**Stress Behavior:** Becomes indecisive & overly sensitive, let emotions impair judgement, procrastinates

**Stress Tips:** Suggest instead of demand, use a low-key personal approach

*Birkman Leadership Style Grid*
The Basics: Emotional Intelligence

- Self-Awareness
- Self-Management
- Social Skills
- Empathy
- Motivation

Term popularized by Dan Goleman in 1996.
Self-Awareness

Know how you feel
Understand your emotions
Understand your actions as a result of your emotions
Understand your strengths & opportunities

To develop self-awareness:
Keep track of your thoughts & emotions
Self-Management

- Self-Awareness
- Social Skills
- Motivation
- Empathy

It’s about regulating emotions & thoughts
Staying in control
Personal accountability

To develop self-management: Understand your personal values & be calm!
Motivation

Consistently work on goals

“Self-start button”

Self-Awareness

Social Skills

Empathy

Self-Management

Interest in getting to the next level

To develop **Motivation**: Develop your personal vision & take action!
Empathy

- What others are feeling
- Important for team management
- Key to developing team members

To develop **empathy**: Listen & pay attention to their body language
Social Skills

- Ability to skillfully relate to others
- Ability to manage conflict
- Ability to manage change

To develop **social skills**: Improve communication skills & acknowledge others for their efforts

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Self-Awareness

Self-Management

Empathy

Motivation
Leading Others

- Communication Skills
- Collaborative Skills
- Develop Others
- Create Team
Collaborative Skills

- Communicate your values
- Define shared values
- Practice delegation
- Manage conflict effectively

Tips: To improve *collaborative skills*:
- Walk the talk!
- Consider establishing a team charter
- Know your team member’s strengths and opportunities
Communication Skills

• Be an active listener
• Practice reflective listening

Tips: To be an effective communicator:
• Be clear and concise
  – What is the situation?
  – What is the goal? Trying to achieve?
  – What are the actions?
  – Results?
• Catch your thoughts!

Source: Beth Kanter, Emerging Leaders
Develop Others

- Encourage feedback
- Mentor others
- Celebrate success and learn from mistakes
- Create the desired culture

Tips to *develop others*:
- Start with yourself
- Be the constant learner
- Provide frequent feedback
  - Every moment can be a “teaching moment”
- Recognize efforts, initiatives, results
Create Team

• Create “safe” space for idea generation
• Establish clear goals
• Live by continuous improvement
• Build diversity

Tips: To create team:
• Create a shared purpose
• Define what success looks like for the team
• Define strategies to achieve the vision
• Establish metrics to evaluate progress
• Reward and recognition
Creating World-Class Customer Service

Be the Leader!

Technology

A Strategic Goal

Build THE Team

Align the Culture
Be the Leader!

Basically follow Leading Self & Leading Others!
Customer Services as a Strategic Goal

Develop a Customer Service Roadmap

- Why do we exist?
- How do we behave?
- What do we do?
- What is the most important thing right now?
- Who must do what?
Research and create customized services and products appealing to our customers.

Develop employees to embrace problem solving, supportive decision making, and relationship building.

Increase Customer Care Survey score, customer retention and loyalty, and program marketability.

Evaluate accomplishment of Mission and Vision, monitor outcomes, and correct course as necessary.
Align the Culture

To develop a culture of service excellence:
• Walk the talk!
• Connect the dots...
• Sustain by structure, policies and procedures
• Share the “wow” notes
• Share the “not-so-wow” notes
Corporate Mission

“To safely deliver clean, affordable, reliable energy and excellent customer service”

Customer Care Goals

Increase program enrollment and retention
Increase employee marketability

Take personal ownership of the customer experience

Achieve recognition as industry leaders
Ensure best-in-class performance of processes
Expand presence at community events

Individual Performance Measures

1) Adhere to attendance policy
2) Achieve call quality score of 80% or greater
3) Maintain average handle time of <4 minutes
4) Resolve customer issue on first call
Ambassador of Code Conduct

- Empowered to resolve most customer issues in one call
- One-Stop-Shop for the customer
- Lower the customer’s effort by being proactive
- Create a customized experience, customer not just an account number
- Educate customer on faster, easier ways to complete transaction
- Understand customer’s hardships and work to provide viable options
Build THE World-Class Team

- Hire the “right” people
- Educate and train
- Retain the “best”
- Empower employees
- Reward and recognition
Effective Use of Technology

• It’s a tool to simplify and enhance
• Have a technology plan
• Protect from cyber-attacks
Proactively explain bills before customers call.
Feedback?

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