PERCEPTIONS & REALITIES

PERSPECTIVES ON SUPERIOR SERVICE AND WIN-WIN RELATIONSHIPS

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I'm Lying, Honest!

CLIENT RELATIONS

Think about experiences you've had as a customer at, say, the supermarket, bank, airport, hotel, doctor's office, or car repair, or experiences you've had online or by phone. What's most important to you as a customer? What makes the difference between the experience being a satisfying one and one that outrages you? When we discuss this issue in my Managing Customer Expectations seminar, one of the things people invariably mention is honesty — wanting to be dealt with in an honest manner.

But what does "honesty" mean? I ask them, "By honesty, are you saying that a service rep who dislikes your hair style or glasses or accent should tell you?" Well, no, preferably not. Most people who describe honesty as important to them don't mean tact, which may entail deliberately withholding ideas or opinions that could cause offense — *not* being honest, in other words.

Your tie is ugly!

When I ask people for examples of what they mean by honesty, they describe the car mechanic who said the frammer-jammer was fixed when it wasn't; and the service rep who guaranteed morning delivery of a critical part and here it is, 4 pm, and not a word; and the doctor's office staff who claimed the doctor was on schedule when . . . well, you know how that goes. On occasion, situations like these are caused by policy snafus, unintentional misinformation, or innocent misunderstandings, rather than forthright fibs. But when you're on the receiving end, it sure feels like blatant dishonesty.

After discussing this issue with numerous groups, I've concluded that one of the key things people mean when they say honesty is important to them is this: They don't want important information deliberately and willfully withheld or distorted. And they'd rather have a straightforward "I don't know" or "I can't," if that's the truth, than a false promise or fictitious explanation.

Untruth and consequences

The vehemence with which people describe their encounters with service dishonesty underscores the emotional nature of this issue. The discovery that people have been dealt with dishonestly provokes anger, resentment, distrust, and language like !@#$%&^#. So certainly, these people — the very people who hold honesty dear — wouldn't knowingly, deliberately and willfully be less than honest with their own customers. Or would they?

When I ask class participants if they ever withhold information from their own customers, their first reaction is usually, no, of course not. Then they pause . . . and reflect . . . And that's when many of them admit, some sheepishly and some with a head-slapping jolt of awareness, that the answer is yes. It seems that

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many of the people who abhor dishonesty when they're on the receiving end have a pattern of withholding information from their own customers. And often, the information they withhold concerns delays, problems, glitches, changes, and other bad news that they themselves don't like to have kept from them when they're the customer.

It's not surprising, therefore, that two of the most common grievances I hear from customers are these:

- When deadlines slip or problems arise in the work being done for them, they aren't informed in sufficient time to take steps to cope with the situation. Repeatedly, customers tell me of being notified shortly before a deliverable is due that the schedule had slipped. Yet, when that slippage is a week or month or, egad, several months, clearly that information was available much earlier and could have been communicated well before the deadline.

- They are too often assured their needs can be addressed, or can be addressed in some particular way, when the truth is otherwise. Numerous customers have told me, with unsuppressed frustration, "If the answer is no, I wish they'd just say so, instead of saying yes now, and then no later on."

Is it any wonder customers become angry, resentful and distrustful?

Bad News Bearers

Being the bearer of bad news is a tough thing to do. And it's understandable to want to delay revealing that bad news, in hopes that circumstances will change and you can recover with no one the wiser. But customers stress that they'd rather have bad news now than worse news later — and for them, not having the news till later automatically *makes* it worse because they have less time to make appropriate adjustments. They emphasize that they, too, have deadlines to meet and people depending on them, and the sooner they know of a delay or a problem, the sooner they can take steps to manage the situation.

Listen carefully to the words of one customer: "I know you can't always get the job done when you said you would. But if that turns out to be the case, just let me know — and let me know *before* the time is up." Most customers are reasonable people most of the time. That's the honest truth. They don't expect the impossible. They know that things don't always work out as planned, and would much prefer to know the situation as it really is, not as you would wish them to think it is. They want to have some control over their responsibilities, and to do that, they need to know the true state of things.

When customers seem overly demanding or unyielding, this behavior may be the consequence of too often being on the receiving end of what they experience as outright, blatant dishonesty. Dare to tell your customers the truth. They may not like to hear bad news, but they'll appreciate you for giving it. Honest!

Perceptions & Realities

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PLANNING

My Strategic Chair

When was the last time you took a break from your frantic pace to perform a strategic review of your service effectiveness? Granted, it's hard to get away from the daily exercise of your hustle muscles. Yet, to successfully conduct a strategic review, you need the right environment. Otherwise, you'll be distracted by that menacing to-do list and you won't be inspired by Grand Ideas.

I recommend going off-site to do big-picture thinking. I'm especially fond of high-altitude strategic review sessions. With my skis strapped on. Gorgeous scenery. Sunny skies. The wind in my hair. Gravity propelling me downhill through pillow-soft snow.

If you can't get away, the next best thing is to create a conducive environment without leaving the office. For some people, a conducive environment means an uninterrupted block of time for reflection. For others, it's having the right people involved so as to maximize idea generation. I know what has helped me. A chair. Really. A chair that helps me think strategically.

I was very fortunate to find it, because you can't always find just the right thing at a yard sale. This chair was a mere $10, bargained down from $15 by my husband, Mr. Never-Pay-The-Posted-Price. It was an unplanned expense, but that was OK, because I already had a column for unplanned expenses in my where-the-money-went spreadsheet. I wouldn't have needed an unplanned expense column if I'd been doing my strategic planning. But I couldn't do effective strategic planning till I had the chair.

This isn't the sort of chair ergonomic gurus recommend for long stretches at a keyboard. No, this was a deep, high-back, swivel-tilt chair. Initially, the swivel-tilt feature left something to be desired, because I could neither swivel nor tilt. The problem wasn't me; it was the floor. It was too far away for me to reach (while seated, that is. I can almost always reach the floor when standing). And the chair was a bit too deep. But a footstool and assorted cushions enabled me to swivel, tilt and roll around my office, all of which inspire big-picture thinking.

The magical thing about this chair is that when I sit in it, I feel strategic. When I sit in my proper-back-support chair, the one designed for banging the keys, I feel like banging the keys, not doing visionary thinking. But seated in my Strategic Chair, the ideas flow, and my long-range planning actually extends beyond what I'm going to do after lunch. If someone calls when I'm in this mode, I explain that I can't talk now, I'm in the middle of a strategic planning session. It really impresses people.

Based on my success, I'd strongly urge you to get your own Strategic Chair. Ask around for the names of yard sale vendors in your area that can offer you corporate accounts. Evaluate vendor offerings in terms of functionality, comfort and spinworthiness. Oh, and make sure that you're authorized to approve purchases in the double-digit range.

Whether or not you can create the ideal conditions, make the time to assess your service success and plan for the future. Otherwise, you'll be forever in a reactive mode. Determine what's working well, and take a hard long at what's not and what needs to be done about it. Analyze what you want to change and what you want to keep the same. Contemplate where you want to be 6 months or a year or two from now, and identify what you need to do to get there. Be flexible. For example, I don't especially like the color of my chair. But strategic beggars can't always be strategic choosers. Not a problem, though, since I barely notice the color while swiveling. Wheeeeee. . . .

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COMMUNICATIONS

Getting People's Attention

If your written material invariably and predictably gets people's undivided attention, skip this article. Otherwise, read on.

Let's say you face one of these situations: You want your management to read your proposal and preferably sooner rather than (the more usual) much, much later. Or you want your customers to read and heed your guidelines. Or you wish those dudes upstairs would follow the instructions and explanations you meticulously prepared for them.

When people face an information overload, and their in box is buckling under #1 priorities, and they need a speed reading course just to get through their email, conventional methods of gaining their attention won't work. You have to *have* their attention before you can *hold* their attention. That means you have to be creative.

Tantalizing titles

One way to be creative is with titles. Authors know that the right title can make a difference between a book buyer and a passerby. Titles I especially like include *Why We Buy* by Paco Underhill and *How We Know What Isn't So* by Thomas Gilovich. Notice the titles that intrigue you, and think about how you can apply the same idea to your material. Aim for titles that will grab your readers' interest, whet their appetite, and pique their curiosity. What about a proposal entitled *How to Benefit from Customer Complaints* or guidelines entitled *Three Surprising Simple Steps for Spectacularly Savvy Service*?

The same idea applies to email messages. If you want your messages to stand out, make the subject line enticing. "An idea with particular pizzazz" is more likely to catch the recipient's attention than merely "Ideas." Create subject lines that are both meaningful and clever, and you'll find that more recipients will notice your messages — and actually read them.

Good looks

A second way to grab readers' interest is to give your material a captivating look. Fair warning, though: A catchy look is not necessarily a readable look. For example, many print ads for high-tech products fall short because the complexity of the images masks the intended message.

The problem with business material, though, is just the reverse: important material with exciting ideas or critical information and a look that's positively yawn-producing. Spruce up the look of your documents. Why limit clip art and word art to presentations when you can just as easily use them in your documents? Make your material look lively, and people will feel lively reading it.

Now opening . . .

A third way to gain readers' attention is with opening lines. One of my favorite opening lines is this one: "On a cold blowy February day a woman is boarding the ten A.M. flight to London, followed by an invisible dog." That's the opening line of Alison Lurie's *Foreign Affairs*, the 1984 Pulitzer Prize winner for fiction. I don't have the patience for books in which I have to wade through 150 pages before the plot begins to thicken. I don't even want to wade through page 2. I want to be hooked by the end of the first sentence, and Lurie's book did that for me.

Consider how you might use similar opening-line attention-getters in your reports, proposals, instructions, memos and newsletters. For example:

- If you think 2,000 calls per quarter to the Support Center is a lot, wait till you read what customers have been able to accomplish as a result of our help.

- This is a set of guidelines about security procedures for people who hate to read guidelines about security procedures.

Documents as snooze-inducers

Of course, all these techniques are worth little if what follows could cure insomnia. So steer away from the pompous professional prose that's so rampant in business material. It's a misconception that business writing must be formal. A conversational, down-to-earth style will win you more readers — and more *eager* readers — than stodgy, passive-voice writing. Be yourself and dare to write as if it's *you* doing the writing. Remember: Mind-numbingly idiosyncratic multisyllabic circumlocutions will impress people on for as long as it takes them to crumple your document and toss it. Obfuscate at your own risk.

If you have something important to say, grab people's attention right from the start. Then give them a reason to want to read it and a style that'll make it enjoyable to read. They may even read it all the way to the end. Just as you have. ☺

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LISTENING

Friends, Romans, Countrymen . . .

Have you ever had the distinct feeling that the person you were speaking to wasn't really listening? Were you convinced the person was a million miles away, give or take a hundred thousand? Has it ever gotten so bad that if your words went in one ear and out the other, it would be a step in the right direction?

Do you suppose other people have ever had that reaction when speaking to you?

For some reason, human beings are designed so that hearing is easy, but listening is difficult. Yet in working with customers, listening — really listening, not just going through the motions — is critical to success. Here are some reminders:

Don't jump to conclusions. Jumping is so easy, especially if you're inclined to think, What does this dingbat want this time? Resist the urge to turn off your mental hearing aid. A key part of caring listening is not to draw premature conclusions about either the person or what the person is saying. Some people never let facts stand in the way of a hasty conclusion. Are you one of them?

Don't interrupt. Make a commitment to keep the old trap shut and to listen as hard as you can. Test yourself by seeing how long you can do it. At first, 15 seconds will seem like an eternity. Then go for 30. Then an entire endless minute. You already know what you think; spouting off won't help you understand the other person's perspective. Although remaining silent is chomping-at-the-bit difficult, you will learn much more by listening than if you constantly interject your own views.

Seek to know more. If you ask questions about what you heard, you'll end up with more complete information. If you don't have any questions, you can still draw the person out by asking, "What else can you tell me about that?" or "Is there anything else you think I should know?" Asking questions has an added benefit: It demonstrates to your listeners that you really were listening. Not that they had any reason to suspect otherwise, of course.

Make listening a conscious activity. It's natural for your mind to wander, and even more natural to let it. You can reduce mental meandering, however, by cutting it short when you become aware of it. Every time you notice that your mind has wandered, respond immediately with a silent Oops, and resume listening. With practice, you can even train a little voice in your head to interrupt your wanderings and bring you back to the present. Do not engage in a conversation with this voice while others are around.

Use a trick recommended by Nonlisteners Anonymous. If worse comes to worse, and you'd rather have a root canal that listen for one more second, pretend you're a famous anthropologist. You've just arrived in a remote village where your mission is to make sense of the natives. They're not like anyone you've ever encountered before so you have to listen carefully. Try it. It works! (But do your best to keep a straight face, OK?)

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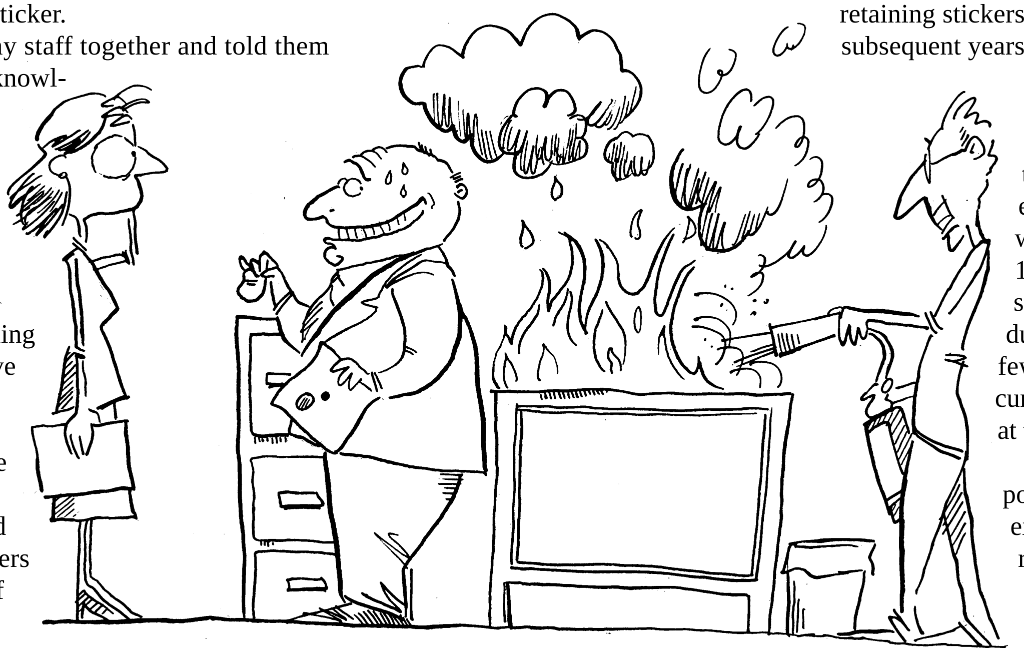
MANAGEMENT

Totally Outrageous Screw-Ups Permitted Here

What's a good way to encourage open and honest communication among your staff, especially regarding problems they face, mistakes they make, glitches they create, and things that just plain seem to go wrong? When I was a client support manager, I tried a light-hearted approach that worked wonderfully. You're welcome to use this technique, but be forewarned: It'll help if you're already known for being a little zany.

It was a few days before year end. I bought some peel-and-stick stickers — the kind that come in different sizes, shapes and designer colors. I selected round, aqua stickers in two sizes, medium and large. I wrote the name of each person in my department on two medium-size stickers and one large sticker.



I called my staff together and told them I wanted to acknowledge their efforts over the past year by giving them something special they could use during the coming year. I then gave them each the three stickers with their name on it.

I explained that these stickers entitled each of them to two medium-size screw-ups and one totally outrageous screw-up during the next year without fear of repercussions. In my sternest mock-serious voice, I explained, "By turning the appropriate sticker in to me at the time of the screw-up, you'll be let off the hook, provided you follow some important rules." I then advised them as follows:

1. To be let off the hook, you must turn the sticker in at the time of the screw-up, or as soon thereafter as you learn about it.

2. Two medium-size stickers are equivalent to one large sticker, entitling you, if you so choose, to two totally outrageous screw-ups rather than one outrageous screw-up and two medium-size ones.

3. Any glitch or goof that I don't know about won't count as a screw-up. However, if you withhold information about a biggie and I come to know of it anyway, you'll forfeit all your stickers, and possibly much more.

4. If a screw-up results from the combined efforts of two or more of you, you can each turn in half a sticker. Fractions less than one-half will not be accepted.

5. Since we're all extremely busy, minor screw-ups should just be fixed without any special fanfare.

6. At the end of the next year, all unused stickers will become null and void. There will be no carry-over stickers, therefore no advantage in exhibiting a year's worth of exemplary behavior in hopes of retaining stickers for use in subsequent years.

In closing, I reminded them that the sticker effective date was January 1st, and any screw-ups during the last few days of the current year were at their own risk.

They got the point: I neither expected nor required perfection. We had a role that entailed tackling difficult situations under stressful conditions and problems would occur. When they did, our approach would be to openly acknowledge them, accept responsibility, resolve them, and do our best to learn from them.

This type of Sticker Strategy doesn't work with people who take themselves too seriously. Fortunately, we didn't suffer from that affliction. We had demanding customers, constantly changing priorities, and critical deadlines, and we all agreed that creating an environment in which we could laugh at ourselves and with each other was an important key to maintaining our sanity.

I made only one mistake. I forgot to allocate stickers to myself. That proved to be a Totally Outrageous Screw-up.

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SERVICE LEVEL AGREEMENTS

Evaluating Your Service Level Agreements

I've reviewed hundreds of draft SLAs. Some have been headachingly bad. Many others have needed only some tweaking, rather than a full-scale re-write. Below are some questions to help you evaluate your own SLA or to request feedback on it from others. Following each question are some explanations and suggestions.

1. Completeness: Are there any critical gaps or omissions in the agreement?

The first step in evaluating an agreement is to check for the presence of the key elements. At minimum, an SLA must include service elements (service description and conditions of service delivery) and management elements (service tracking and reporting, periodic review and change process). The absence of any of these elements is one of the most common causes of SLA failure.

2. Scope: Is the scope of the SLA clear?

The agreement should clearly articulate the services it covers — and perhaps also the services it doesn't cover if either party might otherwise assume such services *are* covered. Some SLAs initially cover only a subset of services, with others to be added later on. For such phased implementations, describe the starting scope in the initial SLA, and then amend the scope and service information as additional services are incorporated.

3. Appearance: Is the agreement readable?

Use the same common sense that applies to any other document: Keep sentences and paragraphs short. Make margins wide enough so the print doesn't fall off the page. Use a large enough type size. I was once asked to review an SLA that looked as if it had been written in one-point type. I explained to the requester that I couldn't read it and I doubted if those he hoped would sign off on it would be able to either. Resist the temptation to squish important information. SLAs that are unreadable aren't read.

4. Length: Is the length of the SLA appropriate?

An SLA should be as long as it needs to be and no longer. To the extent possible, use charts or tables to minimize verbiage and to make key information more accessible. An executive summary may help to convey the essence of the agreement to those who don't need to know all the details. To help those responsible for supporting the terms of the agreement, create a one-page summary of service commitments which can serve as a handy reminder.

5. Language: Is the terminology clear?

Include a glossary to define or explain key terms. These definitions are crucial since terms in the SLA may have meanings different from their non-SLA use. Be careful, though. I've reviewed several SLAs that explained certain terms differently in the body of the agreement than in the glossary. I suggest placing the glossary towards the front of the document rather than at the back, so that readers are more likely to notice it. If you'll be posting your agreement on an intranet, you can link terms that have glossary entries directly to their definitions.

6. Consistency: Is the format and style consistent from section to section?

For example, if the SLA provides several categories of information about a variety of service standards (such as business purpose, service target, performance metrics, reporting process, and division of responsibilities as they pertain to availability, reliability and responsiveness), make sure the format remains consistent throughout. Occasionally, I see SLAs that read as though each member of a Do Your Own Thing Task Force secretly wrote a portion of it and then passed it to the Stapling Committee.

7. Inclusiveness: Does the SLA represent both parties?

An agreement should not sound as if one party created it unilaterally to dictate what the other party will be responsible for. The agreement must articulate the responsibilities of both parties. It's especially important that both parties have a designated SLA manager — someone who will oversee the management of the SLA on behalf of his/her organization — and that the SLA spells out the duties of these SLA managers.

8. Positive tone: Does the tone reflect a spirit of collaboration?

Choose words carefully to communicate that the SLA is a collaborative effort jointly undertaken by both parties. When the SLA is part of a legal contract, this tone of partnership usually takes a backseat to the henceforths, wherefores, and parties of the various parts. To the extent you can, though, give your SLA a sense of we-ness.

See my website (www.nkarten.com) for additional articles on how to create successful SLAs and for information on my 160-page handbook, ***How to Establish Service Level Agreements***.

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ACKNOWLEDGMENT

ThankYouLess Thank You's

When is a thank you not a thank you? Consider these situations:

The anonymous thank you. While preparing an important presentation, a woman named Ginny requested and received assistance from six people. The presentation was a success. Afterwards, she emailed a single message of appreciation to the six. The message began: "Thank you for your input…". No opening names, no greeting, no indication of who the recipients were.

A thank you ought to be a personal thing. Given that only six people were involved, Ginny could easily have sent a separate message to each one, so that she could address each by name. There is, after all, a big difference between "Thank you for your input" (whoever you are) and "Scott, thank you for your input." How much more acknowledged Scott might have felt to be personally appreciated for his contribution, rather than to be part of an anonymous list of unknown length.

The sideways thank you. A company event included a recognition ceremony for the people involved in a complex and highly successful implementation. I was pleased that John, the director, planned this acknowledgment; so often, management views the successful completion of a tough job as "what we pay them to do." Not worthy of any special attention, in other words.

John invited each person in turn to the front of the room and described that person's contribution to the project. Unfortunately, though, instead of looking at each and saying, for example, "Sarah, thank you for the role you played . . .," or "Sarah, your role involved xyz, and I thank you for your efforts," he looked at the audience and said, "Sarah's role was to xyz."

See the difference? Instead of speaking *to* each person, he spoke to the audience *about* each person. John understood the value of public recognition, but it would have had more impact if he had expressed it directly and personally to those who had earned it.

The clueless thank you. Here's a message from a senior VP to his managers and directors:

"I want to congratulate you for your superb work in recent months. I hope you will pass along my deep appreciation and personally thank those who report to you. I'm excited about our people and the performance the company has experienced through their efforts. We have a great year ahead. Let's maintain our momentum."

How many people do you suppose felt thanked by this message? Many might have if it had been part of a culture of appreciation. Such was not the case, however. Low morale and high turnover plagued the company, due in part to a prolonged pattern of non-appreciation, made worse by a reorg which treated employees as irrelevant. In such a context, an isolated, long overdue, global, yay-team thank you like this one can only worsen morale and hasten turnover. Which is what it did.

If you want people to feel lifted by your thanks, thank them personally, thank them directly, thank them now.

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Naomi Karten has delivered seminars and presentations to ***more than 100,000 people*** internationally on managing customer expectations and delivering superior service. Prior to forming Karten Associates in 1984, she earned a B.A. and M.A. in psychology and gained extensive corporate experience in technical, customer support and management positions.

For information on Naomi's seminars on ***Managing Customer Expectations*** and ***Establishing Service Level Agreements***, or her books, ***Managing Expectations*** and ***How to Establish Service Level Agreements***, visit www.nkarten.com or contact her by phone or email.

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