Want to Improve the Health of Your Organization?

Try Taking your Customer's P.U.L.S.E.!.

Vibha J. Buckingham, Associate Director
Facilities Management, Building Services
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AGENDA
Taking Your Customer's P.U.L.S.E

- Why do customer surveys?

- Electronic survey tools
    - Pros & Cons

- Introduce our home-grown survey: P.U.L.S.E

- Why P.U.L.S.E is different
    - How it works
    - Managing & tracking customer comments
    - Crafting solutions
    - Overall benefits

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Why Do Customer Surveys?

- Understand customers' perceptions of our work
- What are we doing well
- What needs improvement
- Resolve customer misperceptions
- Identify solutions
- Demonstrate our care and concern
- Communicate what we're doing to prevent and/or correct
- Strengthen our working relationships
- Improve our quality of service

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Assessing Customer Perception

- Surveys 'harvest':
  - Compliments
  - Complaints
  - Suggestions
  - Misperceptions

- Traditional Methods
  - Phone
  - Email
  - Anonymous electronic surveys

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Anonymous Electronic Surveys: Benefits

- Protection for Respondents

    - More candid responses

    - Easier to relay 'bad news'

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Anonymous Electronic Surveys: Limitations

- Time-consuming:
    - Create & set up
        - Tip: avoid meaningless 'neutral' response option
    - Launch
    - Collect
    - Analyze
    - Report

- Easy for addressees to 'opt out'

- Anonymity brings more than candor:
    - May encourage "service bashing" that is unfounded
    - Prevents connecting specific solutions to individual customers
    - No opportunities to strengthen relationships
    - Customers expect something in return…but
    - Share general results only: "Did you know that…?"

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Our Alternative: Take Their "PULSE!"

- Five questions
- Numeric responses
  - 1, 2, 3, 4 or 5
    - 1=worst
    - 5=best
- One-on-One query/response
  - Manager to Customer brief interaction
  - Personalized attention
  - Reluctant to share negative score?
    - "Our goal is to be the best!"
    - "Only your honest responses will get us there!"
- Given quarterly
- Year-end goal
  - Move 85% of responses into 4 or 5 categories

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How P.U.L.S.E. Works

- *"Tell us how you feel about..."*

- **P**=**P**erformance of our management team
- **U**=**U**nderstanding your needs
- **L**=**L**evel of cleanliness of your space
- **S**=**S**taff (front line) performance
- **E**=**E**verything else
  - *"What else would you like us to know?"*

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P.U.L.S.E in Action…

- ✓ Clip board
- ✓ iPad
- ✓ iPhone

HSPP	⌄
Building:	
McLeod Hall	⌄
Manager:	
Hattie Agee	
Supervisor:	
James Katina	
Customer:	

Performance of our Management Team

⦿ 1	○ 2	○ 3	○ 4	○ 5
Worst				Best

Customer Comments:
There is a problem with communicatin between s

Action To Be Taken:
Set up date to meet with the occupant. begin to

Next>>

0% Complete

Cancel

Slide Number

SW McCormick

Building:

Thorton Hall

Manager:

Reggie McGhee

Supervisor:

Jimmy Sayre

Customer:

Bob Bremmer

Performance of our Management Team

○ 1	○ 2	○ 3	● 4	○ 5
Worst				Best

Customer Comments:

Always around when needed, easy to contact

Congratulate Team Members!!!

Next>>

0% Complete

Cancel

Slide Number

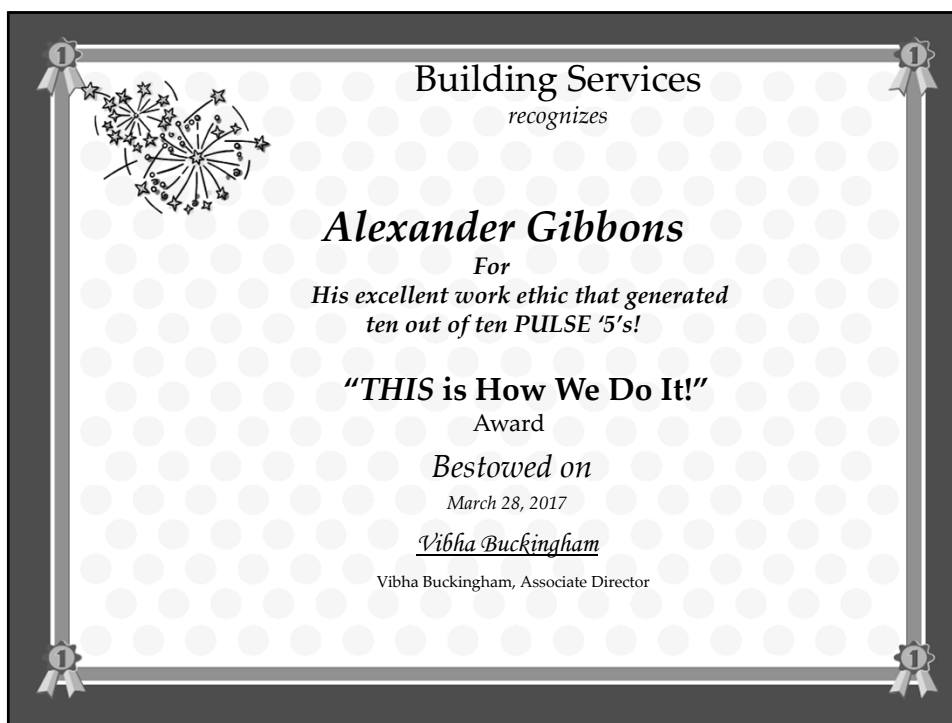
Tracking & Acting on Responses

Responses 4 and 5

- "Best" score categories
- Recognize the team!
- Share specifics one-on-one with front line
- Factor in annual performance reviews
- Bestow '*This is* How We Do It!' awards

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Building Services
recognizes

Alexander Gibbons
For
*His excellent work ethic that generated
ten out of ten PULSE '5's!*

"THIS is How We Do It!"
Award

Bestowed on
March 28, 2017

Vibha Buckingham

Vibha Buckingham, Associate Director

Tracking & Acting on Responses

Responses 1, 2 and 3

- "Needs Improvement" scores
- Resurvey same customers quarterly
- Striving for an uptick to 4 or 5
- Opportunities
  - Customer conversations
  - Develop solutions
  - Correct misperceptions
  - Improve internal process or performance

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Crafting Solutions for 1, 2 or 3 Responses

- Investigate root cause
  - Provide 'why' something is the way it is
  - Improve process
  - Re-train or reassign staff

- Complete customer connection
  - Present findings
  - Share Plan of Action
  - Re-survey in successive quarters

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Why P.U.L.S.E. Works

- One-on-one approach
  - Difficult for customer to 'opt out'
  - Solutions tied to specific respondent
  - Opportunity to strengthen relationship

- Candor facilitated by
  - Number---not word---responses
  - Getting them comfortable giving us 'bad news'
    - "We can't correct what we don't know."

- Connecting with customer is a given
  - All 1, 2, 3 customer responses

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Why P.U.L.S.E. Works

- Internal opportunities
  - Recognize
  - Re-train
  - Manage performance
  - Improve processes
- Re-connect with customers on *their* issues
  - Share projected solutions
    - "We listened."
    - "Would this work for you?"
  - Re-survey successive quarters
- Quarterly metrics
  - Track progress
  - Analyze and understand recurring vs one-off issues
  - Validate successes from a customer's viewpoint
  - Does customer feedback mirror our own internal assessments?
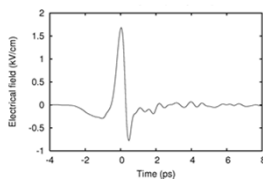
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Electronic Surveys still have a place...

- Projects a more formalized effort
- Anonymity brings certain candor
- Invisible respondents, but
  - Communicate response with "Did you know that..."
- Launch every two-three years
- BUT ...
- SUPPLEMENT WITH P.U.L.S.E!

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Consider this Rx for *Your* Success...

Try taking the PULSE of your customers and see if it doesn't improve the health of your organization!

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