

Steps to Change Podcast: Gary Episode

Allen: Hello and welcome to this episode of Steps to Change, the podcast where we explore learning and development topics, organizational behaviour change, and practical ways to inspire people to act differently through the lens of our Steps to Change, model, See It, Own It, Change It and Live It. On this episode, we're exploring what makes effective customer service skills development programming, and how an experiential approach can help support more effective customer service. We'll start by exploring what we mean by customer service programming, and then take a deeper dive into how we use our Steps to Change methodology and partnership with our clients to design and deliver work in the subject matter.

I'm your host, Allen Liedkie, and I'm joined on this episode by Gary Bates. Welcome, Gary. How are you?

Gary: Hey, Allen. I'm very well, thank you. I'm very well and delighted to be joining you for this conversation.

Allen: Myself as well, delighted that you're here, Gary. And for those listeners out there who might not know you, just give us a little bit of background on who you are, what you do, what Steps and your experience in the subject matter.

Gary: So I'm a Client Relationship Director at Steps. I'm an old timer. I've been around a long time, nearly 20 years now, working with Steps. And my role as a Client Relationship Director essentially means that I am responsible for creating and then developing and building relationships with our clients and overseeing that the work and the programmes that we design and deliver. I've worked with many, many clients over the years in many, many different sectors and on different topics as well, including several programmes around this topic of customer service and customer experience. I was responsible and oversaw a major project we did for Transport for London on customer experience, which was a huge programme on the web. We'll talk a bit more about that later, I think.

Allen: So lots of interesting hats in your position, Gary.

Gary: Indeed.

Allen: I'm really excited for you to join this one to share more insight into the Transport for London programming and other programmes that we've designed and delivered in the subject matter. But also just on an individual level, I've really learned a lot from you and how you engage with the clients that we work with to really help give the best customer service.

Gary: Thanks, Allen. Thank you.

Allen: My pleasure. So, customer service, Gary, let's spend a little bit of time just setting the scene for what we mean by customer service before we take a bit more of a deeper dive into how we implement the learning in the learning journey with the Steps to Change methodology. So what do we mean when we say customer service programming? That could be lots of things. And a second part to that question is why might clients be coming to us to partner with us to create customer service programming?

Gary: I think everyone understands the phrase 'customer service', and we all know what that means, because we've all been customers at one time or another in the highlights, whether that's a good experiences or not so good experiences of being customers. And clearly from an organisational perspective, there are different elements to that, there are aspects, technical parts of that, what kind of processes and systems and structures organisations have in place to give their customers a fantastic experience; in increasingly digital world, some of a lot of that is digital related customer experience.

We don't operate in that field, you know, our work is not about technical improvements or digital improvements, our work is about human interaction and human behaviours. So what we're talking about when we're talking about customer experience and customer services, what is the human interaction that your staff, your colleagues will have with your customers and how can that be even better than it currently is. So that's why clients come to us, is to focus on those behavioural elements of the customer experience, the human interaction, and how those things can be improved.

But the reality is that we all know from our own experience that poor customer service exists. And that's not because people are wanting to give poor service or because they're being horrible. I think people just become unaware of how they're coming across, that lack of awareness. And what we can bring in our work, I think why clients come to us is our ability to help raise that self-awareness that people have around their behaviours, and how they can be really present in the moment and really listen and respond, demonstrate empathy. So it's those kinds of skills that we're looking at trying to raise awareness.

But it's also very understandable as to why customer service levels may drop. Often people in customer service roles don't feel that empowered perhaps and may not be the most experienced employees. That's a generalisation that could be people have been doing the job a long time of course, but many people in customer service roles are younger and maybe not been doing the job that long. There may well be a lack of awareness, lack of experience, but also just, I think people also get kind of worn down by the day to day challenges of being in customer service: it can be a really tough job, it can be difficult. And so trying to maintain that awareness and that level of I need to have a human interaction with this person in front of me, even if it's my 45th customer of the morning, I need to give this person the same kind of quality of experience as I gave my first customer.

Allen: And I think building on that, there's also a real practical reason for this, right; customers, expectations change, customers the way they show up and expect from businesses will change. And so businesses need to be adaptable and know that maybe what worked 5 or 10 years ago needs to really be updated.

Gary: It does indeed. And I think where we're focusing is on that immediate human interaction, but it's also about, as you say, the whole customer experience. And so that's why in our work, we also work with leaders and managers as well, because it's yes, you can improve the skills of frontline customer service colleagues and staff, and how they respond with customers and how they get the best service. But that also needs to be supported by the organisation, by the structures, the processes, the empowerment that's in place to enable those colleagues to give that service.

Allen: Okay, Gary. So there's some good examples of why clients might be coming to us, that's a good overview of the kind of need for good customer service programming. Let's now pivot into the Steps to Change methodology. So at Steps, we always start with 'See It'. And just to remind the listeners, the 'See It' starts before we even get in the room, we do a really good thorough research process where we're holding conversations with people in the organization's a good **selection of** leaders, managers, frontline people, just saying what are the challenges you face in customer service, what are the areas for improvement, where's the stuff that goes really well, and then we take those themes, and then design programming that's really going to be aligned to the learning objectives, the KPIs that organisations expect from their individuals, and then start to create the scenarios that we can go in and hold up that mirror to the current challenges or the current behaviours that are manifesting themselves. So really that's 'See It' piece.

And so I just want to take a little bit of time here, Gary, and just ask you kind of what's the key learning needs for the participants during the 'See It' phase of a customer service skills development programme?

Gary: I think the key need building and what we were saying just now it is about trying to create that self-awareness and really trying to raise their awareness of what are the behaviours that they and others in their organisation might be displaying, that are helpful? But also, what are the behaviours that are maybe not so helpful? What are the behaviours that are not supporting the brand or the image that the organisation is wanting to project? So really, that's what we're trying to do. We're trying to hold up that mirror to what are some of the current things happening in the organisation.

And as you said, because our work is bespoke, and we've done research, the scenarios we create feel real, feel credible enough. We often start our sessions with what we call a scripted scenario. And we often with customer service do what we call a 'day in the life', which I love. And we certainly did this on the Transport for London programme I mentioned earlier, this was a programme working with the bus drivers in London or just 24,000 of them we worked with over a two year period, it was a major programme. And we did what we call the 'day in the life' on that, and we've done this and other programmes too.

And what that means is we create a scripted scenario, which is a series of events through a person's day, through a colleague's day, and the challenges they face. And the powerful thing about that technique is we're not just showing one interaction, where either the customer is in the wrong or the colleague is in the wrong, we're showing that the reality of what can happen in a colleague's day. It's a way of getting the buy in from the group, getting them on side and recognising that we understand your world, we understand the challenges you face in your jobs every day. And we understand that customers can be really challenging and quite difficult sometimes as well.

But at the same time, because they're watching something, they're watching a drama, story play out, it not only engages them on a kind of visceral level, there's an emotional engagement there we all love story, we can't help it be engaged by story, but also because they're watching something, that critical distance allows people start to see behaviour and start to see that people have those moments of insights and aha moments we call them, that they can see, oh, that didn't sound great when he was dismissive towards the customer. They start to see that those very simple behaviours sometimes are not having the desired outcome.

By doing this, before we get to any kind of models or theories, we're just saying, watch this story, engage in this story, recognise it, laugh at it, creating that safe space as well, that place of relative comfort where they know that, okay, I'm not just going to be preached at here, I'm not just going to be told how to do my job, I'm going to be asked for my thoughts, I'm going to be asked for my opinions. Because after these dramas, we start to ask them for their thoughts, we start to say, what was good there? What did the customer service person do well? And we also asked them what was not so good? And we give them a chance to start to voice that.

So they know that this is not a training session. We actually didn't like to use the word training at all. This is not a training session. This is a learning environment, where we want to hear their views, as well. So we're getting them in a place where they are open to learning, and engage right from the start.

Allen: Absolutely. And we can also create a learning environment that uses video or filmed approach, so we can kind of bring in that day of the life through our digital and virtual teams. And then we can also utilise similar approaches through e-learning approaches as well. So it doesn't have to just be live in the room, it can be a live virtual, it can be video-led, it can be digitally-led. So there's many different ways that we can hold up that 'See It'.

Okay, Gary, so we've got the learners engaged, right, they've seen that we've done our research well, we've held up that mirror with the 'See It' phase, and they're starting to really viscerally connect with the content. So that's See It. The next step is to move in to 'Own It'. So from the perspective of the learners journey, what starts to happen in the 'Own It' phase, when we think about customer service, and what are the kind of key learning objectives we're trying to unpack with them in this part of the process?

Gary: In all of our learning programmes, what we're always trying to do is to enable participants to understand what's their responsibility in this interaction, in whichever topic we're working. I think, particularly in customer service, it's very powerful, because it's very easy to blame the other person, isn't it. Whichever perspective we're at, for the member of staff, it's very easy to say, well, this customer is difficult, this customer is never going to be happy. And if we're the customer, it's very easy to blame the member of staff or the organisation, as you said, this person is rude, this organisation is terrible.

So this ownership part is really important in customer service training, because what we're saying is we recognise that some of your interactions can be very difficult, even dangerous potentially. When we worked with bus drivers, sometimes we were looking at situations where there was potentially some serious conflict or danger. But even in difficult situations, what we're starting to do is ask participants to start to understand and discuss and explore what can you do here? Even if everything is not in your control, what is in your control and what can you do? And how can you respond and the situation you're in?

And one of the key techniques we use here is enabling open and honest discussion. So the drama, stories of story, getting them to share their thoughts, puts them in a place where they then feel much more able to start to share and be open and be honest. So we enable that conversation starter, enable them to share their feelings, their frustrations, how they as members of staff feel about the job, about the situations they're in, about customers. And enabling them to voice those feelings and those frustrations is a very powerful way again to start to get them to be honest about what's going on.

But our facilitator has also been very good at acknowledging that, hearing that, but also turning it around and say, okay, given all that what we're trying to do here is think about what are the improvements we can make? So, even in those situations, what are the things we can do?

The other technique is trying to get to put them into the customer's shoes. What does it feel like to be this customer? The drama helps with that, because we use the hot seat in technique. So after the drama, we may have spoken directly to the characters, including the customers, and the customer characters, even though the customer may have come across as very difficult, very aggressive, very challenging, whatever it might have been, but when you then hear the customer story about why they felt like that, what's going on for them in their life, what does it look like from their perspective, this experience they've had with this organisation, that hot seating and hearing it from the customer's perspective starts to help colleagues to understand oh, okay, I can see now why that person might be frustrated or upset.

And the third technique, we do an exercise where we say, what's your experience as a customer? Because we're all customers. So even if we work in customer service ourselves, we're all still customers in our real life as well, in our daily life. So we ask people to start to share their own experience as customers, both good and not so good. And that's a powerful exercise, because it again, it starts to highlight well, what happened when you had a good experience? What did the person do? And again, we're drawing from them, we're not telling them. So we're enabling those often working in smaller groups for this exercise to have that conversation and start to capture what did the customer service person do that made it good or what did they do that maybe not so good and start to crystallise those behaviours and approaches.

Allen: And building on the points that you've shared there, I think from a mindset perspective, there is ownership happening for the learner in the sense that maybe on their journey to developing more effective customer service skills, they realise that they are somebody who automatically assumes the customer is going to be difficult or challenging or that they're wrong.

And so if you're honest with yourself, and you go, oh, maybe I bring that into the conversation, what happens if I start to kind of reduce that bias, and then move more into that empathy piece? So you can start to kind of go, okay, this is where I'm at based on seeing the 'See It', having those conversations with the actors and characters as part of that 'Own It' in that hot seating.

Bates: Yeah, absolutely. And the other thing that comes out of those conversations is kind of realisation that it's not about eliminating mistakes. In complex organisations, things will always go wrong. So you can't eliminate mistakes, but what you can do is start to choose how you respond when those mistakes happen. And when we ask people to share their own experience, the good experiences that people share interesting are often when things have gone wrong. They'll say, I had a great experience at such and such organisation because I had to take something back, they sent me the wrong thing. And it was brilliant because of the way they dealt with it. So it's when things go wrong, that people have a good experience actually often because those are the ones you remember because of how it was dealt with.

And this question around the how is important. Again, this is part of the 'Own It' piece. What we're trying to do in all of these facilitated discussions is start to get people to think about the how, and choosing your response, and how that can make a difference. And this is where we start to introduce a little bit of theory. So we use a model called $E+R=O$, which is a really simple model. So the E stands for Events. So what's the event? And the event could be the customers come to you and that's been sent the wrong thing. And then the R, so $E+R$, will say to people, what do you think the R stands for? And having seen the region first drama, where we're showing perhaps practice that's not so good, I say what does the R stand for? People say it stands for React, it's how you react to the situation. And that's a very natural response.

But actually, what we're trying to do is get people to think about not reacting but responding. So we want the R done for respond, not react. And if you can respond in a considered thoughtful, human way, rather than reacting, and it's very human to react, and we all get triggered by what's in front of us, so if someone's aggressive to you, you may well get aggressive back or defensive or upset. So it's about trying to choose your response. So the E plus the R equals the O and the O is Outcome. So obviously, the outcome can change depending on whether you react or respond. So we start to use this simple language.

And developing common language like this is, again, one of the powerful things about this kind of learning that we're not trying to give people a formula for customer service, but having some common language around it can be helpful in organisations.

Allen: Yeah, especially if you maybe you're someone who's quick to your example there if a customer is really heated and angry and frustrated and if you're somebody who matches that, then this model can actually help you kind of sort of take a step back objectively and go okay, ERO and then just start to give you that little sense of process to be able to help be more effective.

We've got the learners engaged into where they're at in this journey in terms of ownership. So they're starting to own the fact that they have different layers and dynamics to effective customer service engagement, giving them some models and so forth, and start to then now naturally move into the 'change it' space, right. So the 'change it' pieces, especially in customer service programming, I think is in some way a place where our methodology really shines, right, because they really get to start to put it into practice in a helpful environment, in a good learning environment. So what are some of the techniques and approaches we're using in the 'change it' part of the learning journey in our programming?

Gary: Yeah, I think you're right. I think that it can be very powerful our approach in this phase of learning. So, forum drama is one of the key techniques that we use here. By forum drama, we mean essentially playing out scenarios and then stopping and starting and taking advice from the group as we go to improve the interaction. Again, we're enabling the group to own the learning, taking suggestions from them as to how can I have a better customer interaction here?

And based on the discussions we've had, based on the opening scripted scenario they've seen, the answers are usually there in the room at this point. So if I'm playing the customer service agent, and I've started a short interaction with the customer, I might stop the same guy to the group and say, I don't think it's going as well as it could, she seems to be very upset, what can I do here? What would you do? So it's about starting to gather the learning from the group into how to make this a better interaction.

Allen: Double click into that point, I think, what's really amazing about the forum approach, Gary, is when the actor, facilitator goes out as the customer service agent says, oh, this is difficult, what am I doing, how do I manage this, you start to hear all the different responses blah, blah from the participants in the room, and it's a really great moment of learning because people are going, oh, I wouldn't do it that way or I would do it this way or I would try that. And so they really get to start doing that a lovely cross pollination of learning and hearing their peers, how they approach things slightly differently. So it's a really fantastic way of getting a lots of really good learning to the surface pretty quickly.

Gary: The challenge for us in using this technique is to try and crystallise that and then to try and gather what's going to work here. Sometimes we can take suggestions that we know might be not so helpful and play those out. We use rewind technique, replay techniques to say, okay, well, that didn't quite work as well as we thought it was going to work, so let's try something else. So what else did we hear? The other element that's useful here, again, is to try to put some structure around this.

And we have a, I don't like to call it a model, I think it's more like a set of principles, but it is an acronym; so it's the aura acronyms, AURA, and this is an acronym that we developed a few years ago when we were designing a customer service programme for a large housing association in the UK. What we wanted to do was when we were designing this, we thought, what we want, you want people to be human in the interaction, you want them to be present in the moment, that's all you really need in terms of good customer service. What you don't want is a set of a script or a set of instructions as to how to do customer service, because that doesn't work, that actually makes people feel alienated, I think. And if you give staff a script, they can come across as robotic or unempathetic.

So what we wanted to do is try and capture the principles of being human and being present. So come up with the AURA model.

So the first A stands for Attention. So to provide good service, you've got to give somebody a full attention. You can't be distracted. You can't be trying to do two things at once. So the attention part is crucial. The U stands for Understanding. So you've really got to try and understand the customer. What is it that they're asking of you? And that comes from real deep listening skills, active listening skills, using the techniques of active listening to play back what you're hearing, so you make sure you've understood what they're saying, and what their situation is, and what they want. So understanding.

The R is Respect. So you have to respect the customer. Everyone's individual. Everyone is coming to this moment of their day with stuff that's going on for them, whatever it might be. And you have to treat people with respect; even if they are being difficult towards you, you have to try and maintain that respect. So attention, understanding, respect. And then the final A is Action. And as a customer, what you want is what you're going to do about this? That's what you want. So there has to be some kind of action at the end of this customer interaction.

And what we don't want to do is make this rose-tinted. So often in scenarios, there's no easy answer sometimes. But the action could be as simple as I'm really sorry, I can't solve this for you right now. But what I am going to do is I'm going to go away and talk to whoever, talk to my manager, talk to my colleague, or I'm going to go away and find out what's happened with your order, whatever it might be. And what I'm going to do is come back to you tomorrow or whenever. So, having an action under a kind of timeframe around the action.

So again, there's a role for the organisation there and this is where work, with leaders and managers can come into play that it's important that the management leadership structure enables customer service operatives to be able to follow up and to action things, and you've got the right processes, structures, systems in place to support that.

But that AURA model is really useful. And we often use that during these forum replays to start to apply the principles. So we will have shared that acronym and those principles before the replay, perhaps. And so whilst the group are giving advice to the character, we can keep that in mind, and we can keep coming back to **that**, what were the AURA principles here, how can we bring those into the conversation?

Allen: So we've done the 'change it' piece, right, we're starting to give them that practice, that safe space to explore the different behaviours and really understand different ways to approach that from hearing from their colleagues, but also from the models that we're going to be sharing with them. Really key in the last few minutes that we have, Gary, of this episode, that 'Live It' is one of the important parts, how are we really helping the organisations and the individuals and the learners 'Live It' when they take this out of the room as they put this into practice?

Gary: That's a great question. It's one of the most important most challenging things to do in all behavioural learning is to make sure that learning is transferred into the work. I think because of our approach and our techniques, because we've enabled people to see current behaviours raise their self awareness and because we've pulled that ownership withdrawn learning from them rather than pushed it onto them, people are more likely to remember the learning, first of all, and then to put it into practice because they feel that ownership of the learning.

But also, tangible examples and techniques are very helpful here, so the focusing on the how to do it, remembering things like $E+R=O$, remembering the AURA principles of how to be human and present in the moment helps people to remember; when they're back in their day to day job, and they're under pressure, they're faced with a line of customers and somebody's upset, that ability to think, okay, that $E+R=O$, I need to respond here, not react. So building that confidence.

And the skills practice you just mentioned is an important part of that, because I think giving people a chance to actually practice this themselves in a learning programme is hugely powerful, hugely powerful. And we know that that often is where people get the most learning from this. And doing that, because of the work we've done with them using the other drama techniques, they're ready for that skills practice, they're ready to have a go themselves, and to try and put that learning into practice and again, that helps it to really stick, helps the learning to stick and to transfer back into their work.

Allen: And I also think that part of remembering the models, remembering the approach, understand where you're out on your developmental journey as a learner, putting this into practice, one of the key ways that we can really help enforce the kind of living it other is just take a little bit of time and go, okay, so I'm going to have a really good adult conversation with them in their roles and say, so here's the skills that you need to work on, here are the KPIs that your managers are expecting, the leadership are expecting and how this is going to show up, and they know you're delivering well in this space. So giving them the sense of okay now that I've been given the skills development, I can show up well in this place and meet those requirements. And that's just going to have a wonderful impact on the organisation as a whole to be able to really show that they're reaching the expectations for their customers or what have you.

And I think on that, to you on the spot here a little bit, if that's okay for me, Gary, just I know the Transport for London programme with all the bus drivers was a really great success and you did a wonderful job, you and all the teams that worked on it, but what were some of those kind of stats that showed that going through the Steps to Change process really helped them achieve their customer service goals?

Gary: Yeah, it was a very successful programme. But what's important is, well, what difference does it make, as you said? And on that programme, in particular, there were some very specific learning goals that we agreed with TFL. One of them was around reducing customer complaints, and they saw a big reduction in customer complaints after the programme was down around 40%.

But not just about the negative, they also got the customer commendations, which is a really powerful thing to do, and really great for colleagues to hear that, those commendations and they saw a huge increase in commendations to reach the highest level ever after the programme, was around 77% increase in commendations.

But there are also other specific things. One of the core learnings was they wanted drivers to get better at using the PA systems on buses because they just weren't being used. And bearing in mind a lot of the driver populations very diverse in London, many, many different nationalities, and cultural backgrounds. So there was, I think, sometimes a reluctance to make announcements often because people were operating in their second language.

So as part of the programme, we did some work around that; we gave them again, a chance to practice in a safe environment, just in a small group. Just have a go, imagine you're making an announcement on your bus a very simple exercise, but giving people that safe space to practice. But also having seen in the first drama, the effects of not making an announcement, a customer saying, well, what's going on? Why are we stopping here? And so again, the organisation saw a big increase in drivers then using the PA after the programme 57% increase in drivers making announcements when they were needed. Those were just a few of the stats that we gathered.

Allen: I love that. And as somebody who uses London buses, I remember when this was a sort of expectation for them to take back into their everyday jobs and when they started to make those announcements, my heart sang. I was like, people are really living it, they're putting those skills into practice and it's actually having a positive impact on the customer journey on the Transport for London bus service. So there you go.

I mean, Gary, thank you so much for joining us on this episode. Lots of really good insight into the subject matter. So I really appreciate you taking the time and that's about all the time we have left for this episode. So thank you, Gary, for joining us. And thank you listeners for joining us as well.

If you'd like to know more about Steps and Steps to Change, make sure to visit our website, find us on LinkedIn, sign up to our newsletter. All those links will be available in the show notes. If you're interested in how Steps could partner with you or your organization to support your needs, you can send us an e-mail or fill out the form online at www.stepdrama.com. Is there a subject area you'd like to hear us explore? If so, reach out to us via e-mail or on our socials and let us know.

As always, thank you to our production team. We couldn't do this without you. I'm your host, Allen Liedkie, and we look forward to you tuning into the next episode where we'll be discussing developing a culture for disability awareness and how our programming can support a more effective working environment for those who are less able. Until next time, thank you. And remember, you too can See It, Own It, Change It, and Live It.