

# Customer Service Tool Kit

This toolkit contains material to assist agencies deliver improvements in service culture and customer services. The Waterloo Human Services Collaborative Group has adopted the [NSW Customer Commitments](#) as the customer service framework for its activities in Waterloo to help achieve its outcome of improved service culture and provision of customer services

All agencies, Government and NGO are expected to have or develop appropriate customer service standards based on the NSW Customer Commitments. All agencies are encouraged to display their customer service commitments at points of service and to encourage feedback from service users on their customer service, to be accountable to their commitments and to be involved in continuous improvement.

Some of the materials in this tool kit have been adapted from or refer to those developed in Western Sydney and the Blue Mountains by DCJ and NGOs for that area. These can be found at [www.linker.org.au](http://www.linker.org.au)

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## The NSW Customer Commitments

In summary the [NSW Customer Commitments](#) are:

### Easy to access

- Make it easy to access what I need.
- Make it simple for me to understand.

### Act with empathy

- Show you understand my situation.
- Treat me fairly and with respect.
- Provide service in my time of need.

### Respect my time

- Tell me what I need to know beforehand.
- Minimise the need for me to repeat myself.
- Make what I need to do straightforward.

### Explain what to expect

- Be clear about what steps are involved.
- Contact me when I need to know something.
- Let me know what the outcomes could be.

### Resolve the situation

- Be accountable for your actions.
- Be clear in decision-making Reach an outcome.
- Reach an outcome

### Engage the community

- Listen to the community to understand our needs.
- Ask us how we want services delivered.

More information on the NSW Customer Commitments can be found at <https://www.nsw.gov.au/nsw-government/state-of-customer/commitments> with implementation resources at the NSW Governments Customer Experience Unit's [CX Hub](#).

Individual NSW Government Departments have Customer Service Statements that are to align with the NSW Customer Commitments and are to be reflected in an organisation's KPIs, satisfaction measurement and continual customer improvement strategies.

Some key NSW Government Department customer service statements relevant to Waterloo are:

- Homes NSW / DCJ Housing's [Housing Practice Standards](#)
- NSW Health [Your healthcare rights and responsibilities](#)
- [Police Customer Service Program](#)
- Education [Customer Service Statement](#)

## Rationale for a common customer service approach

### A Rationale for a common Government and NGO statement.

*Where the Waterloo Collaborative has adopted the NSW Customer Commitments, the Linker network model had its own Principles and Standards. They were a little broader than the NSW Customer Commitments and incorporated some other common approaches currently still under consideration by the Waterloo Collaborative. The Linker rationale for why a Collaborative needs common principles and standards still applies and provided below. The Linker model was developed by DCJ and NGOs in Western Sydney and the Blue Mountains.*

#### **Rationale for a Common approach to Principles and Standards:**

At the heart of this model is the belief that we will deliver better services when we collaborate and coordinate our efforts. In everything we do - from how we welcome clients, to our referral processes, and how we pool together resources - if we are easy to find and act together (as a Collaborative), our clients will feel cared for and supported by the system. When service providers work together, all pulling in the same direction, the potential to deliver radically better service is within our reach.

#### **Why are Common Principles and Standards important?**

Our clients deserve a consistently high quality of service wherever they go. By introducing common principles and standards we can increase predictability, confidence, quality, and outcomes.

#### **What are the Common Principles and Standards?**

A set of principles and standards used by all service providers to deliver consistent practices and quality.

Almost all unified groups of professionals, such as teachers, nurses, and therapists are bound by a shared set of principles and standards. As a unified group of professionals within the Waterloo Collaborative, we need a comparable set of principles and standards to align our work.

The principles and standards will clarify our purpose, help us focus on what does (and does not) need doing, and support clear and consistent decision making.

#### **What Common Principles and Standards are not?**

It is not a checklist of dos and don'ts.

#### **What service providers have said is the benefit of common principles and standards.**

- Clarity about what is expected of organisations in the Waterloo Collaborative
- Everyone being on the same page about what is expected makes all of us more accountable to each other.
- Consistency across organisations, makes it easier to network.
- Clearer options for assistance and service means a speed up referral process.
- Gives clients a sense of safety and predictability.
- Give service providers confidence when referring clients to other services.
- Helps build a shared commitment to closer communication and client-centred collaboration.
- Clearer options for assistance and service
- Better outcomes for clients: via a supported network, experience and knowledge shared across the region.
- People, families, and the community have more confidence in the whole sector.

#### **How can we promote / uphold common principles and standards in our organisation?**

- By involving them in all position descriptions and referring to during recruitment process.

- Investing time in orientation of new staff so they know and understand our common principles and standards.
- All organisations have the common principles and standards integrated into their policies.
- Having them on display for staff and clients to see.
- Referring to them in staff meetings.
- Incorporate into worker induction/training/supervision/appraisals.
- By keeping discussion and learning opportunities open for workers & volunteers.
- Managers within the network support and mentor each other on how to uphold principles and standards.
- Share and reproduce good practice examples across the network.
- Foster healthy complaints culture.
- Leadership within management (model good practice/performance).
- Call out behaviours that don't meet our common principles and standards.

### **How can we challenge / support other organisations in the network who don't uphold our common principles and standards?**

- Develop agreed steps/systems within the Local Waterloo Collaborative that is respectful and confidential.
- Collectively agree on how to 'report problems' in a safe and constructive way.
- Establish agreed consequences/supports for failure to meet standards.
- Foster a culture of healthy peer support and peer pressure.
- Agree on a self-assessment tool that can be internally administered by the network.
- Organisations should role model good principles and standards so others can follow.
- Look at examples of good and bad practice (review case studies) to form an evidence base for shared expectations.

Source: Adapted from the Linker Playbook pp 14-15.

## **The Rationale for Government Agencies Customer Commitments**

### **Customer Commitments support a purpose driven public service. They can:**

- Show customers the NSW Government listens, understands their evolving needs, and strives to deliver world-class performance for them.
- Provide a tool to align, engage and empower NSW Government employees behind a world-class ambition to deliver a step change in customer service.
- Enable Government to prioritise action to drive customer-centric outcomes. Align the NSW Government brand to its world-class ambition.

### **Customer Commitments were created with customers and staff considering global best practice.**

- "Help to **manage my expectations** so I can manage my time."
- "All the **information about me should be in one place.**"
- "It means **doing that bit extra for you** because you are an NSW citizen."
- "As a customer, you should **know how long it will take.**"
- "**Taking the initiative** to help me."
- "When staff are **friendly**, you can assume they are **motivated.**"
- "**Makes you feel human, not like a machine.**"
- "If they don't know the answer they need to know **where to find it.**"
- "I should be able **to trust what they are saying.** If they can't meet their own deadlines, they should tell me."
- "You shouldn't be treating all customers the same."

- “They don’t need to know everything, but they **should be able to help you.**”
- “It’s **harder to get an answer when something does go wrong.**”
- “I need someone to take ownership.”
- “You **shouldn’t have to be referred to lots of different people.**”

#### **Customer Commitments can support several activities.**

- **Engaging Customers** - The Commitments are based on known drivers of satisfaction and let customers know what level of service they can expect when they see the Waratah.
  - The NSW Government Commitments can incrementally replace public-facing agency commitments, charters, and principles.
  - In due course, customers can use the Commitments to hold Government to account across all services.
- **Building Customer Culture** - An aspirational ambition can inspire, unite, and empower employees.
  - The Commitments articulate the customer experience the NSW Government aims to deliver. Staff ownership of refining and delivering on these Commitments, regardless of service type, can strengthen customer culture across Government.
  - The Commitments can inform training and recruitment processes.
- **Guiding Planning and Measurement** - Improving customer satisfaction is a key outcome targeted in strategic and business plans.
  - The Commitments can support teams prioritise effort based on known drivers of satisfaction.
  - The Commitments are designed to be measurable, noting survey questions may need to be translated into the specific service context.
- **Supporting Whole of Government Decision Making** - A view across Government services of the extent to which commitments are being met will support prioritisation of resources and action.
  - Measurement against the Commitments will build a picture of where investment and focus is required at a whole-of-government level. Measurement may be undertaken centrally or by agencies.

#### **Measurement is key to improving satisfaction.**

- **Measuring performance against the Commitments will help prioritise effort.**

Many agencies already have considerable expertise in understanding their customers in the context of the services they deliver.

The more services that are measured against the Commitments, the greater the opportunities to gain new insights from whole-of-government research and comparisons from similar services.

Without prioritising effort based on the known drivers of customer satisfaction, agencies can spend resources on improving customer experience on attributes:

- that customers do not consider as the most important to them.
- where customer satisfaction already meets or exceeds expectations.
- **Prioritising effort on attributes that are most likely to lift overall satisfaction is the most efficient use of resources.**

Determine which performance against a commitment must lift to increase customer satisfaction based on:

- the gap between customer satisfaction and customer expectation with this commitment against this service.
- the importance that customers place with this commitment against this service.

*Source: This Government rationale has been adapted from a presentation on the NSW Government Customer Commitments*

Customer Service NSW prepares toolkits and guides for NSW Government agencies which might also assist NSW Government Agencies. Resources for NSW Government agencies can be found on the NSW Governments Customer Experience Unit's [CX Hub](#).

### Waterloo Collaborative Rationale for adopting the NSW Customer Commitments

The NSW Customer Commitments provide a whole of government customer service framework across NSW Government Departments and Agencies. Over time all existing government department and agency customer service statements are encouraged to align with the NSW Customer Commitments. The NSW Customer commitments are also to be reflected in an organisation's KPIs, satisfaction measurement and continual customer improvement strategies.

While the NSW Customer commitments provide a common customer service framework across NSW Government agencies, Council and NGOs are not bound by the NSW Commitments. However, as the government framework seems consistent with current NGO and Council customer service approaches the NSW Customer Commitments were also seen as a common approach that could be adopted across both the government and NGO partners of the Waterloo Collaborative.

The NSW Customer Commitments are intended as a framework to be used by individual agencies to develop and improve their own customer service approaches. It is expected the commitments will be imbedded in agencies own customer service statements but that those statements will be tailored to the activities that an agency undertakes. As a result, individual agency customer service statements are different but need to align with the NSW Customer Commitments. Resources for NSW Government agencies can be found on the NSW Governments Customer Experience Unit's [CX Hub](#).

So, while the Collaborative is working in only one suburb and cannot override agencies' own policies and customer service statements, because of the need for agencies to have policies that align with the NSW Customer Commitments, it is possible to use the NSW Customer Commitments as an agreed common aspiration for customer service across the Collaborative and its actions. For service users it creates a common expectation as to the kind of service they should expect from Collaborative agencies. It is also a basis for reporting customer service improvements, the celebration of great customer service, and customer service training as required within the Collaborative's membership.

The NSW Customer Commitments are a starting point for our joint approach to customer service. As the action plan is implemented, the customer commitments may be customised by the Collaborative to fit the specifics of our joint Government NGO place-based service delivery context, in the same way, government agencies might customise the commitments to fit their specific activities.

Some Customer Service Statements when the Collaborative made its decision were:

#### **NSW Government**

- [NSW Customer Commitments](#) and the resources at the NSW Governments Customer Experience Unit's [CX Hub](#)
- Department of Communities and Justice
  - [Code of Ethical Conduct - Communities and Justice](#)
  - [DCJ Child Protection Services Practice Framework](#)

- [Understanding roles and responsibilities in the sector](#)
- Department of Communities and Justice Housing
  - [NSW Department of Communities and Justice Housing Practice Standards](#)
  - [DCJ Housing's obligations | Family & Community Services](#)
  - [Client Service Delivery and Appeals Policy](#)
- Land and Housing Corporation - [Maintenance Page](#)
- Education [Customer Service Statement](#)
- [Police Customer Service Program](#)
- NSW Health [Your healthcare rights and responsibilities](#) (Some parts of SLHD have additional customer service guidance, e.g. at the Dental Hospital)

#### Local Government

- City of Sydney [Customer Service Charter](#)

## Tools - A Guide for Great Customer Service

### Why is this important?

It is important that people's service experience is consistently positive. We know that clients who receive a positive experience when accessing a service are significantly more likely to remain engaged in support and recommend that service to a friend or family member.

A network with a strong culture of great customer service helps clients feel their time spent with services is rewarding and worthwhile. Critically, it ensures clients remain engaged until the desired outcomes have been achieved.

### What is this?

Customer Service refers to the extent to which the services offered by an organisation meets or surpasses the expectations of their clients. Organisations that make customer service a high priority are statistically proven to engage and retain clients much better than those who neglect it.

### What it is not?

It is not an expectation that workers must do anything and everything a client asks or expects. It's not being artificially happy or insincere.

### Organisations that deliver great customer service consistently do the following:

- All staff are on board with being respectful and responsive to whoever walks in the door.
- Expectations of staff are made clear in recruitment practices and job descriptions.
- Strategic planning at a Board/management level reflects a commitment to strong customer service.
- Policies are in place that reflect organisational expectations.
- The value of good customer service is upheld and modelled by managers/leaders.
- Staff make people feel welcome and comfortable with a non-judgmental approach.
- Staff dress casually so as not to be intimidating.
- The organization strives to create a safe and welcoming work environment to promote a sense of comfort.
- Managers promote good practice by reviewing and discussing staff customer service practices in supervision and monthly staff meetings.
- Organisations invest in detailed induction of new staff and volunteers.
- Reception workers benefit from close debriefing and supervision.
- Workers are well trained and have the information and resources they need to assist people.

- Organisations undertake self-evaluation and have a healthy complaint culture.
- Actively look for quality – understand what works and what does not, repeat what works.
- Self-care ... hard for staff to be friendly if they are burnt out.
- Understand and focus on what can we do for people at the essential point of contact.

### How do organisations create a culture of great customer service?

- Culture is role-modelled from manager level down.
- Encourage genuine empathy and compassion is valued.
- Privacy and professionalism are taken seriously.
- Act quickly on complaints and feedback.
- Good systems and procedures ensure communication is clear.
- Staff understand and can communicate reasonable limitations to manage expectations.
- Staff are well trained and supported in their roles.
- 'How well' service is delivered is high on strategic plan and team meetings.
- Welcome opportunities for client feedback via surveys, discussion groups, questionnaires.

### What can organisations do to promote a customer service culture across the Collaborative?

- Build trust through regular meetings and communication.
- Encourage and support relevant training opportunities, sharing of knowledge and examples of good practice.
- Mentoring for managers and staff across the network.
- Have agreed consequences for organisations who give clients bad experiences.
- Shared approach to let clients know that they will receive a consistent quality service from Collaborative partners.
- Invite client feedback between organisations.

### Tips Managers can give staff.

- **Let them see you smile.**
  - Be positive... let them see your smile. A positive experience and a worker that makes a positive impression will go a long way.
- **Let your unhappy clients guide you.**
  - Listen to those that are dissatisfied and act on their advice when it rings true. Find out as much detail as possible. How can you improve overall, not just the end problem?
- **Put the client at the heart of your decisions.**
  - Put the client at the heart of your decisions and take a balanced approach.
  - Be focused on problem solving, not on the process.
- **Set the right expectations.**
  - Be precise and clear in your communication, so you control the expectations you create. Keep your promises.
- **Be prepared to have multiple interaction approaches.**
  - As a client, I expect your staff to adapt his or her style to meet mine, so that we have a good rapport, and your service feels like a 'fit' for me. It is important that the client feels as if they are your number-one client, regardless of the number of clients you serve.
- **Tone is very important.**
  - Always use positive words with a genuine interest in the client's needs.
- **Personalise Customer experience.**
  - Customers want to be treated as individuals, not as statistics.

- No matter whether I tweeted you, called you, sent an email, put a post on your Facebook page, or a combination of all of those, you know who I am, what I need and where it's up to.
- **Share client feedback to the wider network**
  - If people are constantly hearing the same client's complaints, get your staff to relay these complaints back to people who can act on the issues, to make sure future clients don't face the same problems.
- **Respond to phone messages quickly.**
  - With social media, this is the age of the instant answer. A one-day turnaround for an email or phone call is too slow!
  - Try to send a reply quickly, even if it is just to confirm you have received their message and to set expectations for when they can get a proper reply.
- **Be honest.**
  - Be honest. Clients appreciate it! Listen to your clients and educate them for better understanding. You can engage them more if you let them see the bigger picture and the background of some of your decisions.

### What Customer Service Culture Sounds like over the phone.

Exhibiting good customer service over the phone involves many of the same techniques as when face to face with a client:

- Sit up straight and smile – body language impacts tone and pitch.
- Mimic the client's tone and match their pitch and pace.
- Repeat and acknowledge what the client is telling you.
- Assume there is an existing rapport.
- Be mindful and respectful of cultural differences, including language proficiencies (and use interpreters when needed).

*Section adapted from Linker Playbook pages 19-22*

### Customer Service Organisational Self-Assessment Form

This form is designed to assist organisations identify any potential areas for improvement in Customer Service within your organisation (this activity is best done with a small team of people and repeated annually).

*Section adapted from Linker Playbook pages 67-68*



We can all think of organisations and companies renowned for providing great customer service, and they all achieve this by doing the same things, they invest in training, and they foster an internal culture that promotes great customer service as a point of pride among their staff.

We want to be able to ensure great customer service for all people accessing our services because the results that they will be more likely to engage in care and support, and importantly they will be more likely to recommend our services to family and friends.

Answer the questions below to identify any potential areas for improvement within your organisation (this activity is best done with a small team of people and repeated annually).

**Please note:** This check list is intended to be generic in nature, use your professional discretion when answering questions, for example it might not be appropriate for some services to be recognisable from the street:

Assessment Conducted By:

On this date:

**Key:** NA-Not Applicable, ME—Meets Customer Commitments Expectations,

CBI - Could Be Improved

## MANAGEMENT

Do you establish expectations for high quality customer service skills in your recruitment processes?     NA  ME  CBI

Are customer service skills listed in staff job descriptions?

NA  ME  CBI

Is customer service a quality valued and reflected in strategic planning processes?

NA  ME  CBI

Does your organisation have clear policies and procedures in place to ensure good customer service?     NA  ME  CBI

Do managers and team leaders model the organisation's commitment to customer service?     NA  ME  CBI

Does the organisation have staff wellbeing policies and practices in place?

NA  ME  CBI

## STAFF

Do staff receive induction and training on how to provide high quality customer service?     NA  ME  CBI

Do managers regularly supervise and provide feedback to staff on performance relating to customer service?     NA  ME  CBI

Is there close supervision of staff who are regularly the first point of contact for new clients?     NA  ME  CBI

Do staff have access to the information and tools they need to provide clients with a positive experience?     NA  ME  CBI

## PERFORMANCE

Does the organisation regularly review 'how well' services are provided to make improvements?  NA  ME  CBI

Do clients have access to easy and meaningful feedback mechanisms?  NA  ME  CBI

Does the organisation specifically monitor and evaluate its customer service performance?  NA  ME  CBI

## OUTCOMES

List each the items identified as 'Could Be Improved' and what reasonable steps your organisation can take improve:

**Item Required Improvement**

**Actions to be taken.**

## Tools - Customer Service and Enquiry / Complaint Response

### Why is this important

Service users often complain that services are difficult to access, clients are unsure who to go to and when they make an approach service are not responsive and do not meet expectations. In response the Waterloo Action Plan proposed that “Government and non-government organisation to provide clear timelines and commitments to respond to client or service enquiries”.

This is a customer service issue and NSW Customer Commitments and the customer service guidance in this tool kit apply. You will find many tools and templates online to help improve customer service response times. Response times are considered the most important metric when it comes to delivering great customer service – for example see <https://www.keeping.com/content/customer-response-time/>.

Tenants and agencies also report complex issues, or ones that involve multiple agencies or issues, then cannot be easily resolved by the initial contact person often disappear into a black hole and no response is received. Agencies need to make a response within their given timeframes even if they don't yet have a resolution. A response that says “it's complicated and we're working on it” or “we can't resolve this problem” or “we need more time to resolve this” at least lets people know the issue has not been forgotten or ignored.

Agencies report that the same issue is often raised through multiple channels. Having well-functioning formal processes and feedback / capacity building / training for tenants and advocates are also seen as an important to enquiry and response feedback. Resources on effective advocacy should be added to the Toolkit.

### Agency Checklist

Dealing with customer service enquiries and complaints are also a systems issues both within agencies and where multiple agencies are involved. Clear internal processes are required for staff to be able to meet service user's expectations.

Agencies are likely to already have mechanisms in place for dealing with enquiries and complaints. These processes should be continually assessed as part of the organisations customer service approach for continuous improvement and addressing service user feedback.

Below is a check list of mechanisms / approaches agencies should have or should consider:

- Well publicised public contact points for people seeking information, raising issues or make complaints.
- Internal pathway for staff to refer issues raised with them, on the organisations social media channels or at a meeting for follow-up.
- A Linker approach where staff own the issue and respond to the client until it can be referred or escalated to the appropriate person/service.
- Public timeframes for responding to enquiries/issues and complaints and exceed those timeframes as much as possible.
- Internal guidelines/training for staff dealing with customer enquiries and complaints - they are the face of the organisation.
- Internal referral pathways for responses that cannot be handled by the contact point/person.
- Processes for ensuring a response is made within the specified time frame and follow-up if required - even if that is “we are still on the case”.
- A mechanism for follow-up and updating of the external party if the expected response timeframe cannot be met.

- A mechanism for logging enquiries and complaints for follow-up and for analysing patterns and systemic issues
- Responses to customer inquiries and complaints should be part of an organisations customer service KPIs and continuous improvement.

Where multiple agencies are involved in either formal or informal gatherings:

- The person / organisation / group who initially deals with the enquiry / complaint owns it until it can be considered by the relevant agencies. This should apply also where events move quickly or there is not an action plan or follow-up mechanism.
- The multi-agency mechanism should, through Service Level Agreements or Terms of Reference or similar, have an agreed mechanism for dealing with and responding to enquiries / complaints. This should involve a process for follow-up where responses cannot be made quickly.
- The multi-agency mechanism should maintain an action list to keep track of unresolved enquiries / complaints that or required follow-up.
- Refer any systemic issues identified to the Waterloo Collaborative for consideration.

Timeliness in response is important

- If a response can be given more quickly, it is good customer service to do so. People also need to know how to escalate the issue if the timeframe is not met.
- Respond ASAP even if that is an auto-response or an email / post just to confirm you have received the message and to set expectations for when they can get a proper reply.
- If a proper reply is not forthcoming within the provided timeframe, follow up internally and update the external party with progress.
- An active linker approach owns the issue until the person gets what they are looking for or that responsibility is handed over to someone else.

Response Timeframes: Some agencies have public timeframes in which responses should be received:

- LAHC call centre staff have a decision tree for Maintenance which sets priorities and timeframes for different kinds of maintenance.
- DCJ Housing has a response timeframe for different types of enquiries as below:
  1. Request for a transfer to a different property (e.g., 28 days after the request is submitted).
  2. Anti-social behaviour complaint (14 days after the complaint is lodged).
  3. Other tenancy-related matters within 14 days.

### How to Respond to Customer Complaints

1. Listen to or read the customer's complaint.
2. Take a moment to process the criticism.
3. Determine what action you'll take to address the problem.
4. Thank the customer for their feedback.
5. Apologize and reiterate your understanding of the issue.
6. Clearly outline your plan to remedy the situation.
7. Thank the customer again and offer follow-up information.
8. Check to see if the customer is happy with the result.
9. Incorporate changes from customer feedback.

Source: <https://blog.hubspot.com/service/respond-to-customer-complaints>

This resource has been prepared by the Service Integration and Systems Coordination Group as part of Action 4.4 in the Waterloo Plan.

## Tools - Always Welcome Approach (Our Services are consistently welcoming)

### Why is this Important

We all feel good when we're greeted with a warm, caring hello. It starts the experience on a positive note, making you more receptive to receiving help, more likely to come back, and more likely to recommend that person/service to others. We genuinely have a better experience.

Members of the Waterloo Collaborative are committed to providing people with a welcoming experience every time they access a service. It is critical to not only delivering a great service experience, but ensures people are highly engaged so they won't fall through the gaps in our system.

When we can do this consistently, clients will feel both safe and encouraged to engage in the next step of support. Importantly, they will be more likely to return and follow up on agreed actions.

### What is this?

An 'always welcome' investment in staff training and supervision that contributes to a strong 'Customer Service' culture - clients feel listened to, not assessed. Workers are supported to adopt a 'people not paper' approach, focusing on building understanding and rapport with clients, and acting like a linker to support them if necessary.

### What it is not?

Lip service assumption that everyone knows how to be 'nice'. An 'always welcome' approach should feel person-centred, not appointment centred.

### Advice for new staff

Below are some suggestions from front line staff about how they would induct or coach a new employee on how to give a great 'always welcome' greeting.

This is what they said (feel free to share it with your staff):

- Welcome and introduce yourself to the client.
- Smile, introduce yourself, be non-judgmental, and be open. Non-verbal cues when face to face is a good way to help facilitate building trust.
- Always have someone suitable at the front desk
- When the phone rings, pause and mentally prepare, don't be thinking about rushing back to what you were doing before it rang.
- When on the phone, be clear about what you'll be doing for the client and give them a realistic time frame for a call back (e.g., by explaining to them what the process is to give them an idea of why it will take that amount of time)
- Make sure you call the client back.
- Provide your details so they can follow up again if they need to
- Attend training in effective communication.
- Don't assume anything about the clients or make judgements.
- Be attentive and tolerant about what they're telling you, be the support they need you to be.

- Know what other services are/who does what in your organisation.

*Section adapted from Linker Playbook pages 47-48*

### Always Welcome – Organisation Self-Assessment form

This form is designed to assist organisations identify any potential areas for improvement in its Always Welcome approach (this activity is best done with a small team of people and repeated annually).

Section adapted from Linker Playbook pages 82-83



## Always Welcome

### Organisation Self-Assessment form

Organisations in the Waterloo Collaborative are committed to ensuring that when people access services, they feel welcome and supported. So, we can all feel confident that people and families are getting a consistently positive experience from every organisation in the Collaborative, we each

need to ensure that we are demonstrating our commitment to a culture of 'always welcome'.

Answer the questions below to identify any potential areas for improvement within your organisation (this activity is best done with a small team of people and repeated annually). **Please note:** This check list is intended to be generic in nature, use your professional discretion when answering questions, for example it might not be appropriate for some services to be recognisable from the street:

Assessment Conducted By:

On this date:

**Key:** NA=Not Applicable, ME=Meets Collaborative Expectations, CBI=Could Be Improved

## EXTERNAL

Is your service clearly visible and recognisable from the street?

NA  ME  CBI

Does the exterior of your service present as inclusive and welcoming?

NA  ME  CBI

Is the physical access to your service inviting and welcoming?

NA  ME  CBI

When your service is closed, are there clear and meaningful options for people seeking assistance?

NA  ME  CBI

## INTERNAL

Are there suitably skilled staff available to greet people entering your service?

NA  ME  CBI

Does the interior of your service present as warm and welcoming?

NA  ME  CBI

Is the design and decoration of the interior physically and culturally appropriate for your clients?

NA  ME  CBI

## TELEPHONE

Does the organisation have clearly established policies and processes for answering the phone?

NA  ME  CBI

Are staff inducted and trained in how to answer the phone in a welcoming manner?

NA  ME  CBI

If there is no one there to answer the phone, do you have a clear and helpful messaging system?

NA  ME  CBI

## STAFF

Are customer service standards and expectations made clear in position descriptions?

NA  ME  CBI

Do staff receive induction, training, and supervision in providing the 'always welcome' approach?

NA  ME  CBI

Does management promote/model a culture of good customer service?

NA  ME  CBI

## OUTCOMES

List each the items identified as 'Could Be Improved' and what reasonable steps your organisation can take improve:

Item Required Improvement

Actions to be Taken.

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## Tools – Use Customer Journey Maps to improve customer experience

This section of the Tool Kit was adapted from a Masterclass provided by Customer Service NSW to the Collaborative. Customer Service NSW is a member of the Collaborative. It has undertaken some Customer Journey mapping for the Collaborative which have been used as mapping examples at the end of this section.

### What is a Customer Journey Map (CJM)

A Customer Journey Map is a visual representation of the experiences of a customer in navigating their way through a service landscape to achieve a goal.

- It creates empathy by being shown from the perspective of a customer.
- It focuses on service or product touchpoints (interactions) and their experiences with these.
- It provides an understanding of links between services or service elements over time and identifies problem areas to be solved.

A Customer Journey Map is (just) one output within the design process.

- It draws on the output of Discovery, using qualitative and quantitative research methods.
- The research methods chosen need to ground the journey map in real customer experiences rather than an abstract notion of how a service works.
- It assists in defining the key problem/s to be solved.

Customer journey maps set a great foundation for you and your teams for building a collective understanding of your customers' current experience.

#### **Benefits for Customers**

- Services that meet the real underlying needs of customers
- An improved customer experience of products or services
- Less stress and frustration when using products or services
- Removal of thought overload when determining how to use services
- Increased popularity and use of services by customers

#### **Benefits for Government and Services**

- Provides an external, customer perspective of the problem at hand (outside-in approach).
- Helps paint a picture of the wider context in which the problem lies.
- Helps staff understand and build empathy for customers.
- Identify and eliminate ineffective touchpoints/ processes.
- Break down silos between teams and departments and close those gaps.
- Target specific customer personas/ audiences with solutions relevant to their experience
- Understand and assign ownership of various customer touchpoints to increase employee accountability.

#### **Many ways of mapping**

When doing a Customer Journey Map, always look for new ideas so that you can select a format and map elements that best suits the type of journey that you are visualising.

However, there are some basic elements that you would always expect to see in a CJM:

- Who the customer is.

- The journey that they are undertaking.
- The interactions with service touchpoints that occur across different phases of the journey and the links between these, shown as customer actions.
- Their experience at each point in the journey, shown as pain points, gain points and level of effort required.
- Opportunities to create a better customer experience.

While not obligatory, these additional elements can be useful in adding depth and bringing your CJM to life:

- Customer quotes (to show customer thoughts and provide evidence)
- Relevant data snapshots (adding a quantitative element to your CJM)

#### **For More Information**

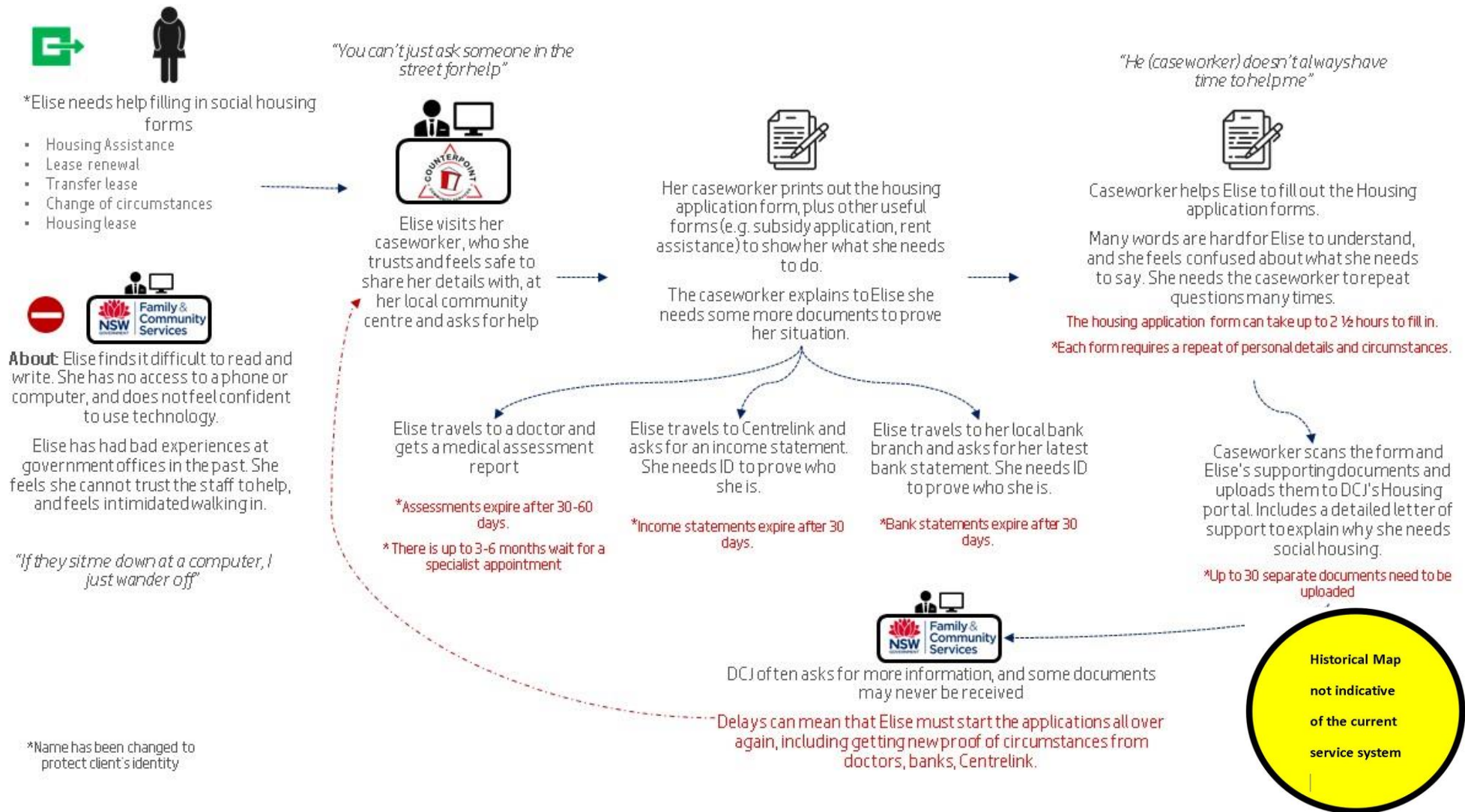
Customer Service NSW use [Miro](#) for constructing CJMs. You can find more information about tools including for Customer Journey Mapping at the [CX Hub](#).

For more information on customer journey mapping see - <https://www.nngroup.com/articles/customer-journey-mapping>

#### [Waterloo Customer Journey map examples.](#)

Below you will find three maps produced from mapping undertaken by Customer Services NSW. It is important to understand that the three examples are snapshots of customer journeys at a particular point of time. Since the maps were made there have been changes made to the way services operate to address identified issues. The maps should not be taken to represent services as they exist today. They are included here as historical examples of customer journey maps previously undertaken in Waterloo.

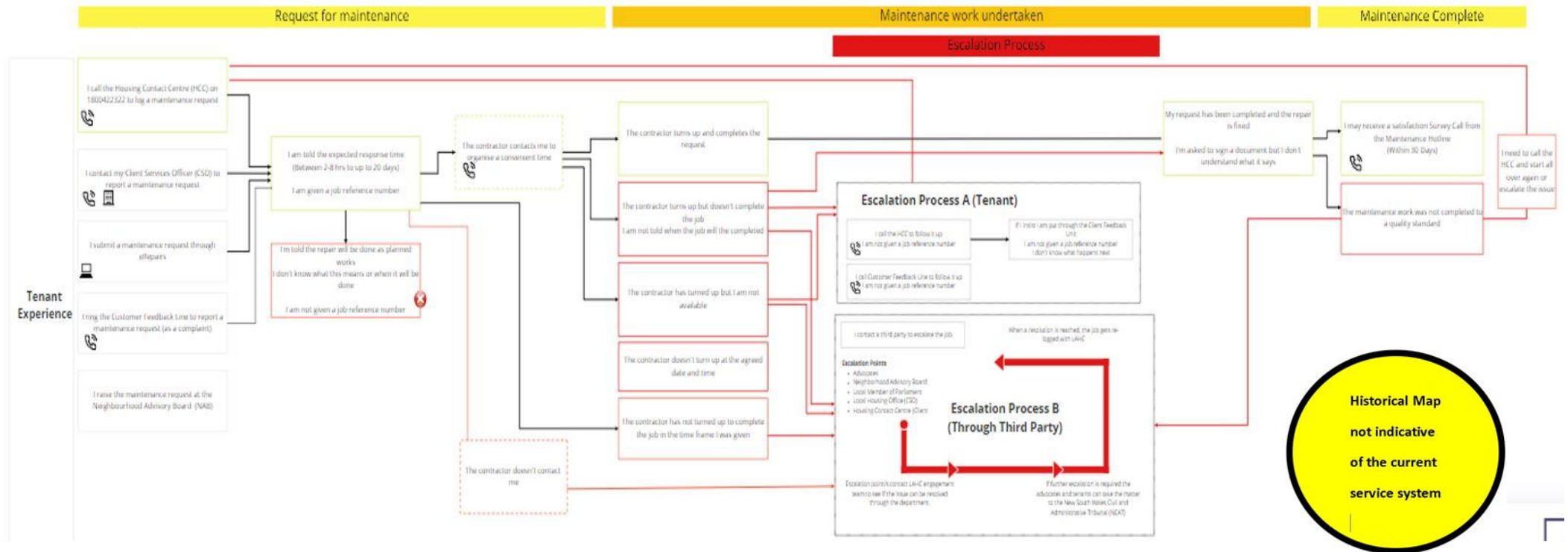
# Experience with social housing - Counterpoint client journey map



Source: Counterpoint Community Services

A number of changes have been made to the operation of the social housing systems since this map was completed and it no longer correctly maps the system

# Maintenance and repairs in Waterloo- Customer Journey Map



A Complex Customer Journey map

The NSW are introducing major changes to the Maintenance System in 2024 to address the kinds of issues identified in this customer journey map

Source: Produced by NSW Department of Customer Service Customer Experience Unit for the Waterloo Collaborative

4 December 2023

# Hoarding and Squalor scenario - based customer journey map



Department of Customer Service  
Customer Experience Unit - Waterloo Human Services  
Collaborative Group

## Journey Map

This is a scenario-based customer journey map, including: Three customer pathways for a Waterloo tenant with complex needs. It is envisaged that additional pathways might be added for this scenario, or additional scenarios created.  
21 April, 2022

## Scenario

A Waterloo Housing tenant dealing with all of these challenges:

- Living in squalor with a hoarding condition
- With mental health problems requiring support from the Community Mental Health team
- Also with drug &/or alcohol addiction

## Suggested next steps

- Targeted tenant interviews for a richer understanding and representation of tenant experiences
- Identify additional pain points, system gaps or cracks
- Overlay with additional pathways and service providers
- Create journey maps for additional scenarios
- Identify actionable opportunities for joined-up services
- It may be useful to think about opportunities within the frame of customer service principles, e.g.

1. Easy to engage
2. Act with empathy
3. Respect my time
4. Explain what to expect
5. Resolve the situation
6. Engage the community

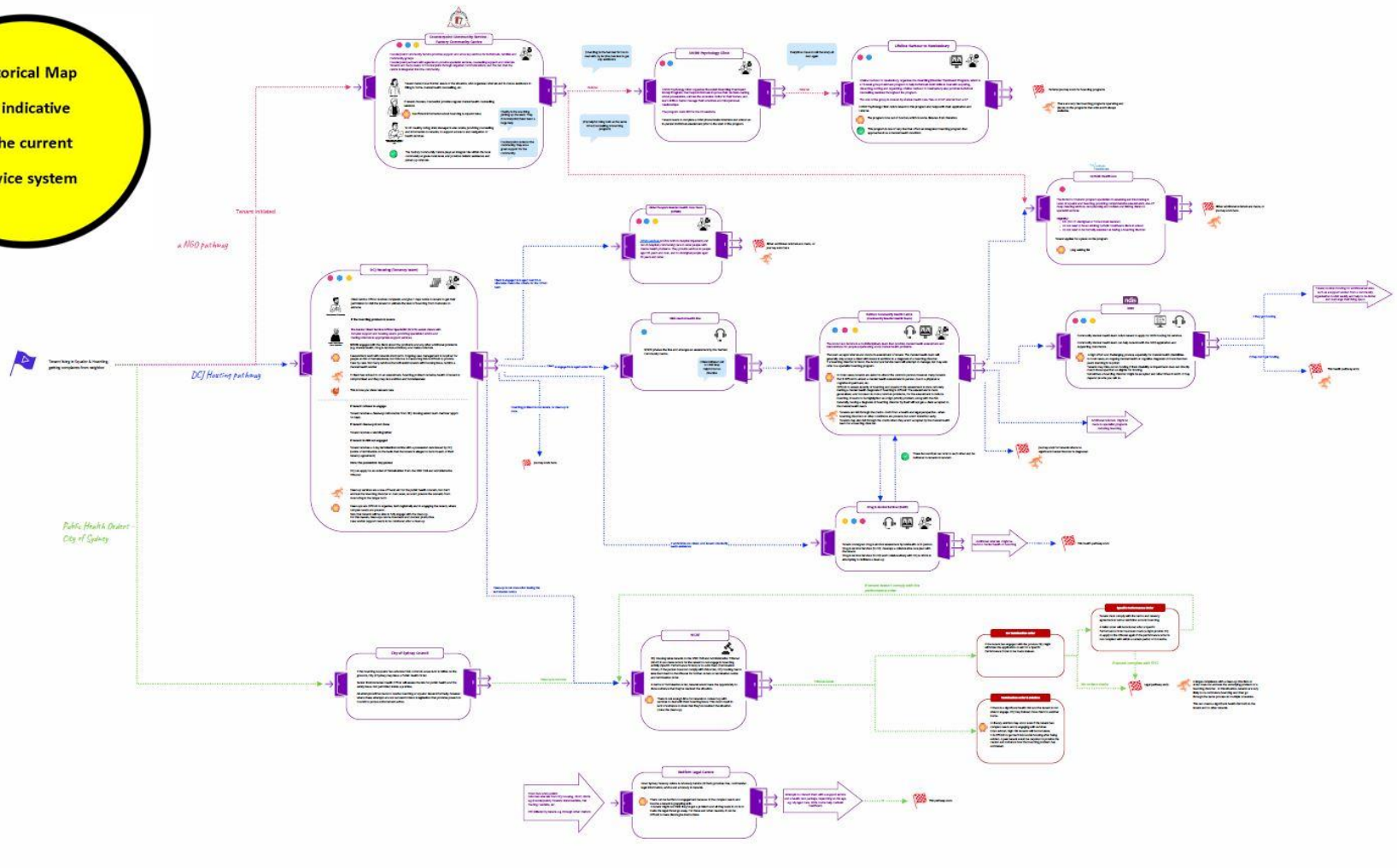
## Legend

- Entry to touchpoint
- Exit from touchpoint
- High effort or pain points for client
- Is working well (no pain point)
- Client pathway (without colour)
- Point where people may fall through the cracks
- Questions
- Multiple languages / translation services
- Online form / Application
- Online information
- Call Center or Live Chat
- Face to Face Interaction
- Phone service or referral
- Legal Proceeding
- Tenant question
- Video conferencing
- Data
- Service Providers

## Service workers



Historical Map  
not indicative  
of the current  
service system



This is a historical scenario- based customer journey map which includes three customer pathways for a Waterloo tenant with complex needs.

Source: Produced by NSW Department of Customer Service Customer Experience Unit with service providers for the Waterloo Collaborative.