



## The Standard Raises the Bar for the Standards of Excellent Service

AchieveGlobal helps industry-leading insurer keep its customer service edge razor sharp.

**W**hen a company truly recognizes that its strength comes from its customers, nothing less than stellar customer service performance is tolerated.

Yet achieving such an excellent level of service can be challenging. And once accomplished, keeping staff focused on providing differentiating customer service long term requires continual honing of customer service skills.

This was the challenge faced by The Standard, a leading provider of group and individual insurance and financial services headquartered in Portland, OR, which recently celebrated its 100-year anniversary. The company's mission to help people fulfill their financial dreams demands the highest level of customer attention and service.

"We want to be the customer service leader, and the way we service our customers is our differentiator," notes Cathy Miller, a performance consultant with the insurer's Human Resources, Organizational Development department.

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This is not a new trend either. The Standard has embraced service excellence training and development as a core value for more than 30 years. It previously integrated outsourced training from various training and development organizations, all which merged several years ago into AchieveGlobal.

Recently, The Standard turned to AchieveGlobal again to refresh and reinforce its customer service skills, attitudes, and behaviors.

"In a very competitive industry where price and product differences aren't often clear to the buyer, our competitive differentiation is delivering better customer service," says Steve Carter, assistant vice president, Special Projects, Human Resources.

### Training for excellence

"Excelling in customer service is more than being nice to customers; it is exceeding their expectations," notes Carter, who was part of the team that evaluated whether to reintroduce stellar customer service skills training to employees.

"Time had elapsed and we'd grown from 1,300 employees in 1992 to more than 3,400 today. It had been some time since everyone had been exposed to the stellar service training programs, and many

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people were new to the company, so it was time to revisit that training.”

Engaging the new wave of training throughout the organization was a multi-step process, lead by Carter, Miller, and others. Those steps were to:

- Socialize training within the organization: Tie training objectives and metrics to organizational and strategic goals.
- Obtain the buy-in from such stakeholders as company officers and internal groups that would help deliver the training. These groups included IT for eLearning and internal trainers, many whom were to be certified by AchieveGlobal to deliver the programs to extend reach throughout the company.
- Set measurement metrics: How will The Standard measure program effectiveness and results?

AchieveGlobal delivered three key customer service modules, with both in-class and eLearning methods. The reintroduction of these programs got underway in January 2006, with the final program just now being rolled out.

### The programs are:

- *Reaching for Stellar Service*<sup>®</sup> – delivers the basics of customer service. An

upfront e-module orients attendees to its concepts. Testing affirms learning. Attendees then participate in classroom work, followed by skills practice.

- *Dazzling Your Customers*<sup>®</sup> – focuses attendees on the techniques and skills for developing even more trusting and collaborative relationships with customers. It helps attendees recognize opportunities to dazzle customers. This module includes eLearning and team-based learning.
- *Healing Customer Relationships*<sup>®</sup> – shows attendees the techniques, attitudes, and behaviors required to recover and rebuild broken customer relationships. The module, for intact work teams, includes managers and their direct reports.

While these programs are being rolled out in phases, the buzz about them within the organization is creating demand to accelerate the learning, notes Cari Bacon-Flick, second vice president, Organization Development.

“We’re now just a few months into the new training, and already we are getting tremendous pull for the programs from within the organization,” she says. “Everyone knows that it is a strategy of ours to excel in customer service and each unit is defining what that means for it.”

### Less time, more punch

Comprehensive training programs, especially those that focus on the nuances of human interaction like customer service, can be time intensive. Yet these AchieveGlobal modules deliver comprehensive learning experiences in less classroom time than other options, notes Adrienne Bailey, an associate education and development specialist with The Standard.

“The Stellar Service program, for instance, reduced classroom involvement from five hours to two because much of it is delivered upfront via eLearning. And this leaves time to practice driving these skills home,” Bailey says.

One memory device built into AchieveGlobal’s program is the **STAR** Qualities, which stands for:

- **S**eamless interactions within departments to resolve issues
- **T**rustworthiness with customers that help solidify relationships and retain customers
- **A**ttention to the customer’s needs and to the details required to resolve them quickly and correctly
- **R**esourceful in problem solving by customer service individuals and all employees

“Employees remember this acronym and what it stands for, so when they interact

with customers, it helps them improve their results,” Bailey says. “We do a good job here of hiring employees who have strong customer service skills. The AchieveGlobal programs reinforce how important stellar customer service is to us as an organization and that we expect our customer service to be the best in the industry.”

For Lisa Lakes, team lead for the 11-person Regional Service Team of The Standard’s Retirement Plans Administration department, the AchieveGlobal programs help employees really comprehend the meaning of customer service and satisfaction.

“Everybody knows that customer service and customer satisfaction are important, but how it happens—what goes into making customers happy—isn’t necessarily innate, but rather is comprised of skills and attitudes you need to discuss with staff and talk about,” she says. “The AchieveGlobal programs stimulated my staff’s thinking about their work from the customers’ perspective ... what the elements are to making customers happy. The Report Card checklist is worth the entire program.”

“It shows, for instance,” she adds, “that a ‘C’ grade, which many who’ve not been exposed to customer satisfaction training believe is what customer service is all about, means you’re meeting the

customer’s expectations, but you’re leaving the customer feeling neutral about you and your company. If you’re delivering ‘A’-grade service, the customer feels valued and experiences being dazzled. This tool alone helps people realize they have to go beyond basic expectations to get the customer coming back,” Lakes says.

### **Internal focus important too**

It can be easy to forget that just because the title Customer Service Representative isn’t on our business card or cubicle that we’re not part of this all-important outreach. Everyone in an organization has a customer—other people and other departments within the same company, if not the customers who buy products and services.

That internal customer is who The Standard’s Information Technology department serves. Michele Jordan, IT training manager, was certified by AchieveGlobal to deliver its programs to ensure her group excels at servicing internal customers.

“There is a huge downside to not excelling ... it means customers are not happy, that we are not delivering the right tools, or we’re saying one thing but not delivering it,” Jordan says.

“When we fail to deliver on promises, it brings trust into question and both short- and long-term perceptions of how

IT delivers on its commitment to excel in the delivery of solutions to our interior customers,” she says.

StanCorp Mortgage Investors, an affiliate company which delivers mortgage and asset management services to The Standard customers, has both internal and external audiences to service and please. That’s not a small matter for Mark Fisher, vice president and managing director.

“As the leader of this business, excellent customer service matters, and excellent customer service is part of our brand and why people come to us to borrow money,” he notes. “Certainly I got behind this training; I’m selfish and I want the company to do well, and I want us to do well.”

Fisher was pleased with how the training improved his brokers’ customer skills. He asked his team to create skits about these interactions for a day of team training.

“That emphasis sends a powerful message that this is important,” he notes. “We learn by teaching others, and by having my team get on stage and deliver their customer success case studies to the group is the best way to ensure accountability and that they follow through with what they’ve learned. And, it’s a lot of fun.”

## Measuring training's impact

For The Standard, evidence that AchieveGlobal service training has taken hold is everywhere.

For Brandy Simons, team lead in The Standard's Retirement Plan Administration department, which manages client companies' employees' 401(k) programs, the improvement is measurable.

"The program helped our group improve turnaround times, which is something our clients aren't necessarily aware of, because they don't know or care how busy we are. Our clients have come to expect excellent service, and our service times are

holding the same whether we're in a crunch or not," she says.

"My team has always done a good job of going above the call of the overall industry," she adds, "but *Dazzling Your Customers*<sup>®</sup> gave them a new perspective; they not only strive to do an even better job but ask what other additional services they can provide to a customer."

Response time is one way StanCorp Mortgage Investor's Vice President Fisher measures payoff from the programs.

"Because response time is important to people, we measure our application and document turnaround times, and we measure our reliabil-

ity: Does the loan close when we say it will close?" Fisher notes. "We monitor how well we do through surveys with the broker and the borrower to learn what part of the process they liked or didn't."

For Lakes, the Retirement Services regional service team lead, the focus on results is both now and tomorrow. "It's important that we require ourselves to take a step back from the day-to-day to ask ourselves, 'What are we doing today to make the client happy?' It's the continuous focus on improvement that drives us to excel in this all-critical competitive advantage called customer service," Lakes says.

## About AchieveGlobal

AchieveGlobal ([www.achievegloabl.com](http://www.achievegloabl.com)) provides research-based learning solutions that aid clients in developing leaders and acquiring, growing, and retaining profitable customer relationships. Working with AchieveGlobal's trainers and consultants, clients can translate business strategies into business results by improving the performance of their people in the areas of leadership development, customer service, and sales effectiveness. AchieveGlobal offers more than 100 comprehensive, integrated training and consulting solutions through offices throughout Asia and in 40 countries around the world.

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