Customer Service Standards

Several years ago the US Congress passed a law that required US Government agencies to develop an Enterprise Architecture to show how IT supported the work that the various agencies were being asked to do. That law and the work done to implement it has done a lot to advance the state of business architecture in the US. First, the government agencies developed a business architecture—often creating standards and new tools to accomplish the work that needed to be done. Then, individuals experienced in the government effort focused on teaching private industry what they had learned as they developed their architectures.

Today, something similar is about to happen in the area of Customer Service processes. The US Congress is set to pass legislation that would establish Government Customer Service Improvement Standards. This legislation has been proposed in the past but it seems likely that this time it will pass. If it does, government agencies will be required to define their customers, develop standards for providing services, and work to improve those services. If this happens, it will not only lead to lots of interesting work within the government agencies, but it will likely be picked up by organizations in the private sector as well. This would be good news for those of us engaged in process work. We all know that changes in how people access information and respond to requests are occurring rapidly as new media redefine how we interact. Developing new models and defining standards for new interactions would be beneficial to both product and service providers as well as the customers they serve.

Everyone pays lip service to the idea that customer service is important and that organizations ought to pay attention to how their business processes interact with customers. Some organizations actually follow through, but most don't. Indeed, the customer service function is more confused than it needs to be.

The problem begins with the fact that too many process practitioners still think of customer service processes in terms of manufacturing processes. Most early process work was done in manufacturing organizations, and the concepts developed for manufacturing still tend to dominate our thinking for service processes and too many people still draw models like the one shown in Figure 1.

Figure 1. A Manufacturing Process that Finishes a Product and Sends it Off to a Customer

The focus of quality control and measurement in manufacturing organizations is typically focused on producing a final product for delivery to the customer. In fact, today, even manufacturing processes tend to be more complex than this, and true service processes tend to be much more complex, engaging the customer over a number of different interactions. (See Figure 2) Each interaction is an opportunity for the organization to impress the customer, or to upset the customer. Each needs to be defined by the business process analyst and measured by the process manager to assure quality service delivery.
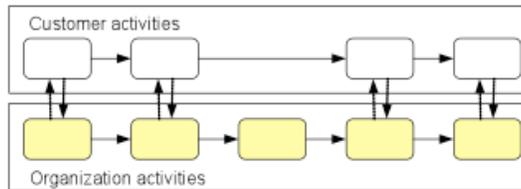

Figure 2. A Service Process with Lots of Customer Interactions

The latest version of the OMG BPMN modeling notation makes it easy to define process diagrams, like the one in Figure 2, which pictures the customer activities in their own swimlane. It's significant, however, that most of those teaching the use of BPMN tend to ignore this option, omit the customer swimlane, and turn their diagrams into networks that focus on the internal business activity flow, making it hard to see how the company interacts with a customer. Others represent the customer swimlane as a bar and ignore what goes on as the customer struggles to interact with the organization.

Assuming your organization has a good model of the interaction between the customer's activities and those of your organization, what do you do with them? Do you, for example, look at the customer's process, as a process, and consider what the customer has to do to do in order to do

business with your organization? In essence, a customer process is like any other business process—it can be diagrammed, analyzed and improved. If you do examine your customer's process, you can often see ways to rearrange your process to simplify the customer's process—to reduce the customer's time, or to simplify what the customer needs to do to interact with your organization. Figure 3 shows how we analyzed a specific customer process and began to make notes on how it might be improved.
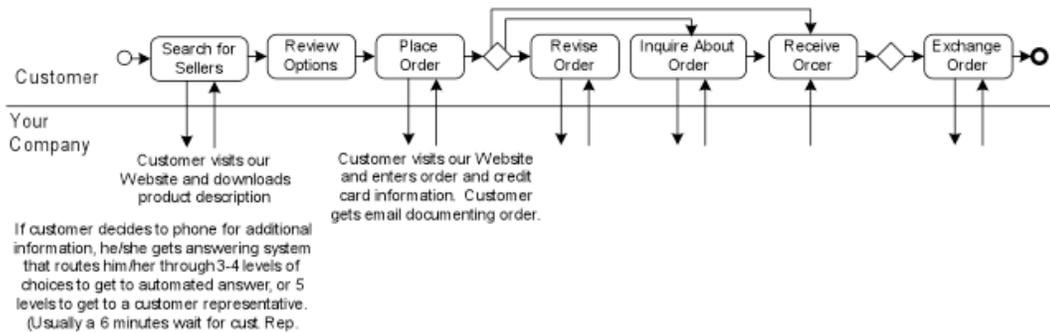

Figure 3. An Analysis of the Problems and Opportunities Presented by a Given Customer Process

We don't picture it in Figure 3, but we often find it useful to shade the boxes in a customer process diagram to indicate the value-add of any given activity. This is a technique borrowed from Lean to help analysts discriminate between activities that must be performed, and those that waste customer time.

Many organizations have introduced radical changes in their business processes by turning over some activities to customers. For example, most of us now pump our own gas, deposit our checks in ATM machines, and assemble our own IKEA furniture. Some of us choose not to do it ourselves and we are generally offered options, but many of us would rather do it ourselves to assure we can do it how and when we want to do it. In cases like these, by rethinking both the customer and the organization's processes, we create a situation that saves the organization money while simultaneously leading to greater customer satisfaction.

So far, we have spoken as if there were always one customer and one customer process. In fact, using BPMN, it's often possible to identify and diagram multiple customer processes. Figure 4 shows how three different types of customers might interact with a single business process. In this example, the interactions are very straight forward.
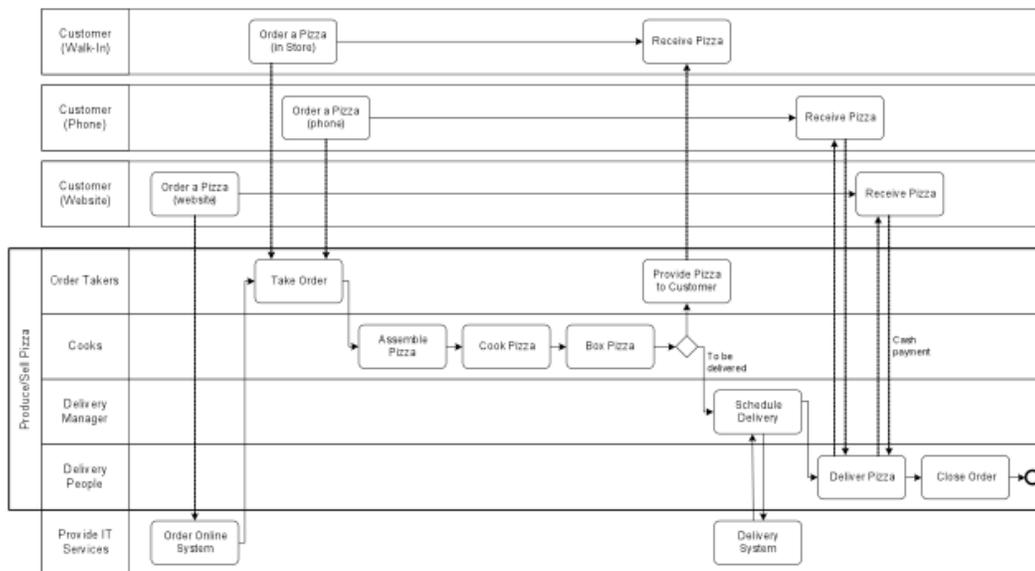

Figure 4. A Business Process That Has to Deal with Multiple Types of Customers

Another process analysis we did for a government client involved a health insurance interaction, where the government's process was required to interact with three different customers: with citizens, with physicians, and with health insurance companies. In this case, the various customer processes were interacting with each other at the same time they were all interacting with the government, and the various interactions all needed to be clearly understood in order to

determine how the government could improve the citizen's health care process.

Setting aside the problems of modeling the interactions between the organization and the customer, consider, instead, the problem of measuring results. In the manufacturing world, measurement is often straight forward—was the product available when the customer requested it, did the product arrive soon after the customer ordered it, and did the quality of the product meet the customer's expectations? As we have already seen, a typical service process often involves many different interactions, each critical to the overall success of the service offering. In this situation, we need to define measures for each interaction. How efficient was the initial call to request the service? How quickly did the organization respond to the request for service? Was the response appropriate? Did the customer need to call again? Was that response appropriate? How soon after the service was requested was the service available to the customer? Was there a set up required and how satisfied was the customer with that process, etc.. Evaluating service processes requires a comprehensive analysis of lots of specific interactions and lots of data if one is to complete a useful and reliable evaluation.

Evaluation usually involves a table with quite a few measures for each customer process. In addition, some of the evaluations get rather subjective. Was the clerk on the phone friendly? Did the explanation make sense to the customer? All of these things can be evaluated, and must be evaluated if your organization is serious about defining good customer interaction standards. In most cases, they require sampling techniques and a conscious effort to make the subjective ratings as objective as possible.

So far we have spoken as if the interaction between the customer and the organization was between two humans. What if your organization uses some kind of CRM software and the customer deals with you via emails, an internet site, or by smart phone? The introduction of electronic interactions can increase customer satisfaction, if it is handled correctly, with smooth, easy to understand interfaces and constant availability. Or, it can make the whole interaction more confusing and frustrating. There's nothing as frustrating as having an automated answering system provide you with three choices, none of which matches the situation you face. Broadly, the need to define the activities in the interaction and to evaluate each of the interactions remains—it is just that the details involved in defining standards and conducting evaluations differ. Testing online automated systems requires more trials to assure that the systems will please rather than frustrate your customers.

As we have tried to suggest, the latest process work provides new techniques and new tools that can generate better customer interaction models and better evaluations. We expect that entirely new models of customer-organization interaction will evolve in the next few years. The challenge, today, is to get organization's to step back, think hard about how they want to interact with customers, and to take advantage of the latest techniques and tools to significantly improve the customer experience.

Till next time,

Paul Harmon

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