Enhancing Client Retention by Engaging Your Staff in Customer Service

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Disclosure:
The presenter, Ann Hogan, has no financial conflicts of interest to disclose.
Introduction to the Virtual CoP webinar

WELCOME to our virtual CoP webinar format

- This session is a 30 minute on-demand COP webinar
- After viewing the webinar please follow the link to provide immediate feedback
- You will have access to an online Question and Answer (Q&A) chat session - designed to follow up on the topics covered in this CoP
  - Submit your questions online and check for daily answers!
Presenter - Ann Hogan, M.Ed., SHRM-SPC
Certified Senior Professional in Human Resources

Ann Hogan has over 25 years of experience in the Human Resources field, including: training, employee relations, conflict resolution, employee development, strategic planning, and benefits and compensation management.
Today’s Agenda

① Why an Engaged Team is Important
② Six Beginning Steps to Engage Employees
③ Developing Customer Service Standards
④ How to Engage Your Team for Client Retention
Why is an Engaged Team Important

- 80% of employees with a high degree of trust in management are committed to the organization, compared with 25% of employees with a low degree of trust (Center for Creative Leadership, 2009)

- Highly engaged employees have fewer absence days – on average 3.5 days – compared to employees who were not engaged (Gallup Germany, 2011)

- Engaged employees outperform disengaged employees by 20-28% (The Conference Board, 2006)
Employee Engagement Video

“Who’s Sinking Your Boat” from The Engagement Group
https://www.youtube.com/watch?v=y4nwoZ02AJm

The Engagement Group provides many free resources on Employee Engagement
6 Steps to Engage Employees

1. Let them in on what is happening in the organization
2. Let them feel included in the decision making
3. Let them know your expectations
6 Steps to Engage Employees (con’t)

1. Allow employees to make decisions when it comes to customers and clients
2. Create a **Values and Vision Statement** on how to treat customers and clients
3. Develop a **Customer Service Plan and Policy**
Developing Customer Service Standards

◆ **Performance indicators and standards** as they pertain to customer service

◆ **Provide data** as a baseline and have specific **improvement goals for employees**

◆ **Survey** client satisfaction as well as employee engagement
Customer Service in Person-Centered Care Resources

Resources at SAMHSA

National Institutes of Health-The Epital Care Model
https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5282450/
Developing Customer Service Standards

- Define customer service within your organization
- What does it “look like”
- What needs improvement
  - Survey employees
    - What tools or training do employees need to meet the standards
  - Survey clients
    - What do clients expect
How to Engage Your Team for Client Retention

• Develop a plan with all staff where ideas and opinions can be shared
• Conduct a SWOT Analysis for client retention
  • What are the organization’s Strengths
  • What are the organization’s Weaknesses
  • What are the organization’s Threats
  • What are the organization’s Opportunities
Client Retention Improvement Plan

- **Outline** the **Plan for Improvement** and share with all staff and patients
- **Evaluate** the plan on a regular basis and make adjustments
- **Communicate** consistently with all staff the goals of client retention, how they fit in, and how the organization is performing on meeting the goals
Today’s Review

1. The Importance of Employee Engagement
2. Six Steps to Begin Now
3. Customer Service Standards
4. Engaging Your Team
Citations

Books:
- Communication the Cleveland Clinic Way by Adrienne Boissy, MD, MA & Timothy Gilligan, MD. McGraw-Hill, 2016.

Articles:
- INC, “7 Steps to Engaged Employees” by Peter Economy, August 29, 2013
Citations (con’t)

Articles:

- (The Conference Board, 2006) cited in “Five Principles so Effective Internal Communications” by Pierponter, June 20, 2013. [Link]
Next Steps…

After this webinar–

- Please follow the link to **provide feedback** on this virtual webinar
- **Participate in the online Q&A chat session** with Ann Hogan by contacting Jamie Weinstein, jweinstein@mayatech.com
Recordings & Slides

Recordings & Slides for the *Client Retention CoP webinar* are available [on the CIHS website](http://integration.samhsa.gov)
Additional Questions

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Additional Comments?
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integration.samhsa.gov
For More Information & Resources

Visit www.integration.samhsa.gov or e-mail integration@thenationalcouncil.org
Thank you for joining us today. Please take a moment to provide your feedback by completing this survey:
https://www.surveymonkey.com/r/FeedbackSurvey2018VirtualCoPWebinar