Availity Quality Service Standards

Customer service as a market differentiator

2019

Instructor Guide

Availity Quality Service Standards

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INSTRUCTOR NOTES	
	Narrative for course content is included to provide context and clarity. Instructors should never read from the Instructor materials. [*Content in brackets and italicized font provides notes for the instructor on ways to promote interaction or greater detail on the purpose of an exercise. This is not content to share with participants*.]
	Discussion questions are provided in **Bold Font**. Use these questions to promote interaction and discussion with and among the participants.
	EXERCISES have been designed to promote learning and transfer of the concepts and ideas back to daily activities. Always allow enough time for participants to complete the exercises and be available in the room to answer questions or clarify the directions. Exercises are identified by shaded boxes and Bold heading.
	A copy of every slide is included in the Instructor guide in the left hand column. Several slides build so to avoid confusion, a blue arrow (**->**) indicates when the instructor should click to continue the presentation/animation. Just as you prepare for class by reviewing the content notes, you should also practice with the slide presentation.
	The participant materials follow the content and format of the instructor materials but do not match the slide deck exactly. In a couple instances, extra pages are provided for the participants to complete an exercise or to provide additional content. The Participant Workbook pages are duplicated on the even numbered pages that face the instructor content. Occasionally the appropriate page number is provided in the IG instructions for exercises. You can always find the PG page number on the even numbered page that displays that content. Also note that the final section of both guides (Resources) includes one page reference tools for participants regarding skills such as listening, telephone etiquette, as well as reference copies of some slides.
	A variety of service examples are provided in the Instructor Guide in green font. You will probably not want to use all of them but you should read through them so you can use the ones you feel will speak to your unique audience.

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Notes for the Service Failure Exercise, Lesson Four

Possible examples (feel free to substitute your own.)

- Your scrum team committed to a date that you are not going to make. The date is a month away but you are sure you will not be able to deliver on the committed date.
- Due to circumstances totally beyond your control, you missed an important status call with an owner Health Plan.
- During an implementation, some remits were 'lost' for a new payer.
- A large Provider office is calling because their claims are not getting through to one of our owner Health Plans. You have researched it and discovered that the HP system has been down all morning.
- During a status update call, one of your team members begins venting his frustration at the number of changes the customer is asking us to make to the plan that they previously agreed to follow.
- A tool developed by your team created/wrote is being used by another team. One of the developers from the other team is reporting defects in the code that will keep them from being able to use it. They have a significant customer commitment that is now in jeopardy.

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Supplies:

- Flipcharts with paper – get paper with sticky backs
- Markers for flipcharts and tables (for name tents)
- Whiteboard (in training room)
- Dry erase markers for whiteboards
- Lots of post-it notes in various colors
- Pens (in case participants forget them to write in their PW)
- Name tents
- Timer: https://www.marinaratimer.com/

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Why bother to focus on the *quality* of our service?

> MARKET DRIVEN AND HIGH
> PERFORMING PRODUCT AND
> SERVICE ORGANIZATION.
>
> PAUL JOINER
> 2019 OPERATING OBJECTIVE

Service is _____

Service is _____

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Availity Quality Service Standards

Availity Quality Service Standards — Customer service as a market differentiator — better information. better insights. better outcomes. 2019	Why bother? Thinking about service is probably going to slow us down. And it might make everything harder, more tedious and time consuming. Besides, our biggest customers are also our owners. They don't really have a choice whether or not to use us, right? Seriously…. Is that right? Leadership (Joiner) has decided to make the quality of the service we deliver a focus for attention, and (hopefully) improvement in 2019. What does that include: the words we use, the quality of the information we provide, the timing of the information we provide…. All those things are a part of how Availity is perceived, how our service is evaluated by our customers. **So why? Why make improvement of our service a focus in 2019?** [*Allow time for the participants to respond. This is not a rhetorical question. Participants need to understand why this is important so that they feel invested in making changes*.] ->
Customer Service is personal	Service is <u>personal</u>. People have an emotional response to the way they are treated by service providers. **What do you think when you see these logos?** [*Allow time for the participants to respond. It is important for them to understand they have emotional reactions to these logos.]* Chances are Amazon makes you feel a bit excited – perhaps a package is coming! Maybe Dove helps you feel relaxed. Probably the Disney logo made you smile – it's fun there. Volkswagen used to make us feel secure until their recent misadventures. Maybe now the logo makes you feel betrayed, distrustful. There's no right or wrong reaction to these logos, but I do want you to grasp that the emotional response is there. Service is personal. Things can change, like Volkswagen. Their logo used to make people think of positive feels and now are mainly negative. ->

Availity Quality Service Standards

Why bother to focus on the *quality* of our service?

> MARKET DRIVEN AND HIGH
> PERFORMING PRODUCT AND
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>
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> 2019 OPERATING OBJECTIVE

Service is _____

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Customer Service is personal Availity™	**What do you think people feel about this logo?** [*Lead a discussion of what customers think of Availity products and services. Do our customers feel they get high quality service and products or can we do better? Ask also for feedback on the level of the quality of internal customer service. How well do we support each other*?] ->
Service is *PERSONAL.* Service is *INTENTIONAL.*	Service is also <u>intentional</u>. Good service, service that makes you feel good, does not just happen. Companies that have successful service organizations focus on delivery, they are intentional about how they want their people to act and respond. **Can you think of a company who is intentional about the service they provide?** Disney provides a great example. The happiest place on earth is not happy just because that's the way Walt wanted it. They have invested time in determining a set of guiding principles that are used by employees/cast members at all times. Everyone is trained on them and these Quality Standards dictate everything that they say or do. Have you ever noticed how many trash cans Disney has? One example of their commitment to intentional service delivery is that you will find a trash can every 27 steps. It's a convenience and keeps the park clean. It was intentional and planned. In 2019, service delivery is a goal for the Availity organization. Work has already been done to identify the Standards to make Availity successful. These lessons, this work is being provided to you so that you can successfully apply them to your work and your customer relationships. ->

Availity Quality Service Standards

agenda

Lesson 1: Focus on Service DELIVERY

Lesson 2: Focus on YOUR customers

Lesson 3: Focus on the STANDARDS

Lesson 4: Service Recovery – a roadmap

Lesson 5: Integrating it into our Availity Culture

3
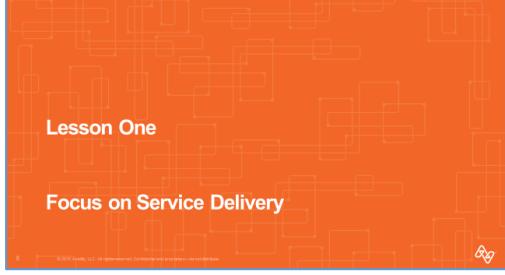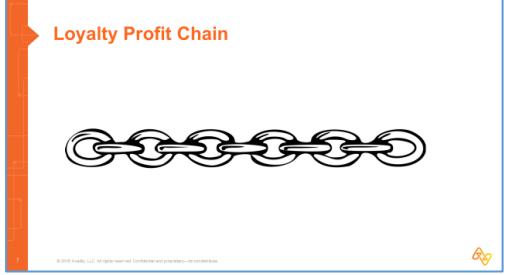
Availity Quality Service Standards

agenda

Lesson 1: Focus on Service DELIVERY

Lesson 2: Focus on YOUR customers

Lesson 3: Focus on the STANDARDS

Lesson 4: Service Recovery – a roadmap

Lesson 5: Integrating it into our Availity Culture

Today we will work through five lessons to help learn and apply these standards. Then, before we leave we will address any special considerations or concerns you have regarding how these principles will apply to your teams.

Let's get started.

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Availity Quality Service Standards

Lesson One

Focus on Service Delivery

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Loyalty Profit Chain

Customer Loyalty

External Service Quality

Shareholder Value

Employee Satisfaction

Employee Productivity & Performance

Customer Satisfaction

Superior Customer Value

Revenue, Growth, Profitability

Internal Service Quality

Employee Retention

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LESSON ONE:	Focus on Service Delivery
	So far we've discussed how service is personal and that service, at least high quality service, is intentional. **What is another reason to focus on service delivery?** Time now to look at third reason to focus on service delivery: it's profitable. ->
	In Disney's Custom Solutions training, they teach the concept of a Loyalty Profit Chain. Disney believes that customer loyalty is linked to service satisfaction and that customer loyalty is the differentiator in growing a profitable business. Each link in the chain is important to the next one. If one link breaks down, profit could be at risk. The chain has some important take-aways for Availity as well. Turn to page 5 in your workbooks and see if you can put the links of the chain in order in the next two minutes.
	EXERCISE *PW5* *Have the participants use the next five minutes to label each link in the profit chain in order.* *Review how the participants labeled the chain links then continue explaining the chain. Let participants check their answers against the answers on page 5.* ->

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Loyalty Profit Chain

Internal Service Quality

Employee Satisfaction

Employee Retention

Employee Productivity & Performance

External Service Quality

Customer Satisfaction

Superior Customer Value

Customer Loyalty

Revenue, Growth, Profitability

Shareholder Value

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Loyalty Profit Chain
- Internal Service Quality
- Employee Satisfaction
- Employee Retention
- Employee Productivity and Performance
- External Service Quality
- Customer Satisfaction
- Superior Customer Value
- Customer Loyalty
- Revenue, Growth Profitability
- Shareholder Value

1 – <u>Internal Service Quality</u>. Internal service quality reflects the ability, interest and authority employees have to achieve results for customers. It also includes the way people serve each other INSIDE the organization. If internal service quality is high, the second link is established – employees are happy.

2 – <u>Employee Satisfaction</u>. Employees who are well treated are satisfied and three times more likely to stay with the company than employees who are dissatisfied.

3 – <u>Employee Retention</u>. Everyone knows it's expensive to replace employees. Long-term, loyal employees are more productive because they "know the ropes." The losses incurred due to employee turnover include recruiting, training – lost productivity.

4 – <u>Employee Productivity and Performance</u>. High performing, productive employees can provide services efficiently and anticipate customer needs.

5 – <u>External Service Quality</u>. When external service quality is high, customers are happy and satisfied. They say good things about you to others.

6 – <u>Customer Satisfaction</u>. Leading companies are currently trying to quantify customer satisfaction. Research indicates that merely satisfying customers may not be enough to keep them loyal.

7 – <u>Superior Customer Value</u>. If an organization wants to retain customers, it must take steps to create superior customer value. Value is determined by the results customers receive in relation to total cost. Expectations must be exceeded.

8 – <u>Customer Loyalty</u>. Loyalty is the result of complete customer satisfaction.

9 – <u>Revenue, Growth, Profitability</u>. Once again, research shows that a 5% increase in customer loyalty can produce profit increases from 25% to 85%.

10 – <u>Shareholder Value</u>.

Zappos Service example: employee bought the wrong pair of shorts and realized it when she got it in the mail. It was her mistake. She called them and told them what happened and asked how to exchange the shorts. They apologized for HER mistake, told her to keep the shorts ("it's just a pair of shorts") and sent her the ones she wanted for free.

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2019 Strategic Aim: Clarity, Alignment and Focus

Objectives

Health Plan and Provider business under one symbiotic strategy

Fastest growing healthcare network

Market driven and high performing product and service organization

Industry leading technology platform built on a secure cloud and micro-services architecture

Creativity, innovation and thought Leadership in reduction phone calls and faxes between providers and health plans

Data driven culture executing against key performance indicators (KPIs & Balanced Scorecard)

Availity's *Core* Values

- Best Results for our Customer(s)

- Open and Inclusive Dialogue

- Trusted Relationships

- Customer Inspired Innovation

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Every link in the chain is important.	**So why is it important to understand this chain?** [*Allow some to voice their opinions on why the chain is important then wrap up with the info below*.] Our ownership structure causes us to think a little less about shareholder value, but our owners are some of our biggest, and most vocal, customers. Negotiation of their contracts is made easier if we are supporting them in a way that promotes their interest – providing quality service. It is important enough that it is EVERYone's job to provide service at a level that is an unexpected surprise. ->
Disney's Loyalty Profit Chain Internal Service Quality Employee Satisfaction Employee Retention Employee Productivity and Performance External Service Quality Customer Satisfaction Superior Customer Value Customer Loyalty Revenue, Growth Profitability Shareholder Value	And something very important is reflected here. **What is the very first link in the chain?** Yes! A strong loyalty profit chain begins with a focus on internal customer service. The way we treat each other is the foundation for all other service success. Keep that in mind as we work through the rest of the exercises today. ->
2019 Strategic Aim: Clarity, Alignment and Focus	One more link or connection needs to be made. Quality service is a clear directive for 2019. Paul mentioned it in his November 12th update. In order for Availity to become a high performing product and service organization, every employee must be committed to providing quality service that exceeds customer requirements and expectations. At the December AEM, Paul mentioned in 2019 we would get to know our customers better. We'll be talking about that more today. ->

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	Quality service also supports our Core Values. Innovation requires trust, and we can build that trust with our customers by acting in a way that provides open, inclusive and frequent dialogue and is focused on tasks and responses that provide the best results for our customers. At the end of the day, that's quality service. ->
 'Customer service shouldn't just be a department, it should be the entire company.' Tony Hsieh, CEO Zappos	**What do you think of this quote? Has anyone had an experience with Zappos that delighted or disappointed them?** [E*ncourage at least one participant to share a very good or very bad example of customer service. You may also use one of the compelling narratives below as an example*.] Brian Jewel service example (Tale of Two Companies): The home router went out and multiple things in the house ran off of it. Brian spent 5 hours online trying to figure out how to fix it. Tried to reboot, etc. Finally, he tried customer service at the router company. Took a while to find the correct phone number. Called tech support, explained the issue. His response "you did everything I would have told you to do. You can send it to us, we'll repair it, and send it back. It doesn't include shipping." Brian asked how long it'll take. Response was 7 – 14 days. Brian couldn't be without a solution that long so told the service rep he was going to think about it. Wondered if he could return it for a new one. Went to Amazon and looked at his orders. Click on tech support button. It asked when you would like to be called. He selected Now. They called immediately and arranged to have it delivered that day. It was a 2 minute phone call. The rep at Amazon was empowered and knew what she was able to do – it is part of their culture. Availity employee ordered a robot kit from Home Science for her son's science fair project. A few days before it was due, a motor broke. She ordered a new one from Amazon, but it did not work with the breadboard. She sent an email to Home Science requesting that they overnight a new motor, not really expecting a response since there was no phone number on the site and this is a not for profit company. The next day, she received a call (she had included her number in the email) from Home Science who confirmed which motor she needed and had it overnighted for no additional charge. They actually sent two motors so she would have a back-up. They received it the next day in time for her son to finish his project on time. ->

Availity Quality Service Standards

Lesson Two

Focus on Your Customer

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Know the Customer

We can never have exceptional service without a holistic understanding of our customers.

N needs
E emotions
W wants
S stereotypes

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Availity Quality Service Standards

|	
	NOTE: *The way you facilitate this lesson should be determined by the composition of your participants. If the class represents a cross section of teams or functions, lead the exercises as they are set up in the participant materials. If, however, the class consists of employees from one team or function, they should have the same customers and you can have them work together as a larger group using flipchart paper on the walls.*
Lesson Two Focus on Your Customer	You are probably thinking "enough already, just give me the standards and let's go". But before you can apply any service standard, we need to make sure you know who your customers are and that you understand their needs. That's what we are going spend a few minutes doing in this lesson. ->
Know the Customer We can never have exceptional service without a holistic understanding of our customers. N needs W wants E emotions S stereotypes	As you have no doubt heard, we used the Disney process to create the Availity Quality Standards. As a part of the journey to get there, the Availity team had to examine our customers and answer four questions: What do our customers need? What do our customers want? What is the emotional state of our customers? What stereotypes are out there that could impact our service? In order for you to be able to plan how you will leverage the Quality Standards, you need to understand the same questions. But first, let's get specific about who your customers are. ->

Availity Quality Service Standards

Availity Quality Service Standards

What do your customers need?

What do your customers want?

What is the emotional state of your customers?

What stereotypes are out there that could impact your service?

Internal Customers	Touchpoints
External Customers	

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Availity Quality Service Standards

Who is your customer? Internal Customers — Touchpoints External Customers	In your participant workbook on **page 10** you will find this grid. **Why do you think Internal Customers are listed first?** [*Hopefully participants will remember that in the Value chain it's clear that quality service begins with a focus on keeping internal customers happy and satisfied.*] Spend the next 3 minutes listing your customers. Feel free to work with others in the class who may be from the same team or work group. For this part of the exercise, just focus on listing your customers in the left hand column. [*Circulate the room to be sure participants have made a good start and understand the purpose of the exercise. Allow up to 5 minutes if they need more time.*] You may find you have others to add later, but this is a good start. Now focus your attention on the right side of the grid. **->**
Service Touch Points • Service is consumed in many pieces/experiences over time • There must be a balance of consistent customer experiences • A customer's first experience becomes that customer's complete context of Availity – until the next experience Where do you interact with customers? What are your touchpoints?	**Who thinks they know what a touchpoint might be?** [*Ask this question before displaying the Service Touch Points slide. Someone in the group may have already figured out that a touchpoint is any place where an employee touches, or services a customer. Walk the group through the different touchpoints of eating at a restaurant. As participants share one, write it on the whiteboard/flip chart as a timeline.*] Yelp, reservation?, arrive, parking, door, greet, waiting?, sat, wait, server, order drinks, wait, order food, wait, dine, wait, check, leave Each of these touchpoints can be positive or negative. [*Label each touch point as positive or negative and talk through it.*] Each touchpoint can be a positive or negative experience. A customer's last experience is the one they remember, positive or negative, with that company until the next experience. So, you need to think about that last experience your customer has with our company. All these experiences, via touchpoints, make up an overall experience over time.
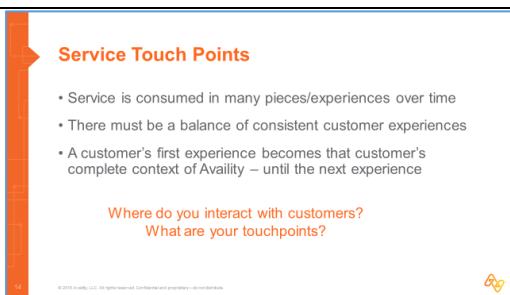
Availity Quality Service Standards

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	What are some examples of touchpoints with our company? [*Suggestions should include: portal landing page, products delivered, email, phone conversations, meetings….*]
	Now spend about 8 minutes, listing all the different touchpoints for each customer. These are important because once you get the specific details on our Availity Quality Service Standards, you will need to know when and how to apply them. The work we are doing now, lays the foundation for that important step.
	[*Allow up to 10 minutes if needed for participants to complete their grids. Be sure to move around the room to answer questions as needed. Before moving to the next exercise, check for understanding and help the participants add to their touchpoint lists. Also tie the exercise back to the Loyalty Chain – the importance of internal service quality.*] **->**

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Needs: Situational needs, not basic human needs

Wants: What is the customer's desired outcome?

Emotions: What is the customer feeling?

Stereotypes: What does history lead the customer to expect? What expectations do you have?

If we want to change the stereotype, how do we do it?

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Definitions

NEEDS
- Situational needs, not basic human needs.
- What does your customer need from you?

WANTS
- What is the desired outcome?
- What does the customer hope to gain from the experience?

N
W E
S

EMOTIONS
- What is the customer feeling?
- Is the situation safe for the customer?

STEREOTYPES
- What does history lead the customer to expect?
- Is it positive or negative?

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If you felt it was difficult to identify your customers, how can you get to know them better?

You should know the needs, wants, emotions and stereotypes of all of your customers. You may not sit and list them all, but if you don't understand your customer in these four areas, you will be limited in your ability to provide really excellent service.

So, how can you get to know them better?

[Suggest attend user groups, listen in on ACS calls, site visits, read industry articles, asking clarifying questions during customer calls, etc.]

Great work!

Now let's go back to the compass. Now that you have specific information about who your customers are, and the times, places and ways you might interact with them let's look at some examples of what that could look like.]

[*Ask for a volunteer to discuss one of their customers. Ideally you will have time to do this twice – two different volunteers and customers, and if possible, you should discuss one internal and one external customer example*.]

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Let's take a closer look at Stereotypes. They can be dangerous.

What is a stereotype?
We all know what stereotypes are – history tells us whether or not to feel good about situations and even people. So often we head into a situation with a predetermine expectation of what the outcome will be.

What are some examples of stereotypes we have of our customers? Let's say one of our health plans?
[Could use a different customer depending on the audience. Write their responses on the whiteboard or flipchart.]

What are some examples of stereotypes our customers have of us? Let's say one of our health plans?
[Expect the feedback to vary and remember there are no right or wrong answers. Write on flipchart.]

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	Why do you think they have that stereotype of us? Stereotypes are created – sometimes they are based on truth and sometimes they may be based on perceptions, which means they can be broken. We have to be intentional about breaking stereotypes. Do something different – act against the stereotype. **What preconceived expectations do your internal customers have of you?** [*This is an excellent opportunity to drive home the importance of quality internal customer service. Remind the participants that internal customer service lays the foundation for the quality of service we deliver to external customers*.] So we acknowledge that just as we have stereotyped our customers, they have stereotyped expectations of us. **Is that it then? Stereotypes are set and we shouldn't expect any change?** [*You must drive home the point that even if our customers have negative stereotypes of us, we have the power to change those stereotypes for the better.*]
	So if we want to change the stereotype, how do we do it? [*Examples:* • *Disney is only for kids – Disney targeted commercials showing adults going to Disney without kids* • *Inside cabins on cruises are not desirable b/c they're dark, feel claustrophobic – Disney innovated the inside cabins and turned around the stereotype to make inside cabins more desirable than outside – added portals to inside cabins that had a camera feed from outside to show what it looked like outside and then added random Disney characters that appeared in the portal – because kids were so fascinated with the portals, they didn't want to go to bed, so Disney added a way for parents to turn off the portal so kids would go to bed – this was all intentional to combat stereotype of inside cabins – and was innovative*.]

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	We need to work cross functionally to define stereotypes and create plans to overcome them. As a general rule, all of our work outputs depend in some way on the outputs of other teams. We are customers of each other. To be really effective and prepared to offer Quality service to external customers, we can't work in silos.
	
	[Refer to the list of stereotypes that customers have of us.]
	
	How can we change some of these stereotypes of us and make them positive?
	If you want to make your business better, listen to your unhappy customers because they will tell you the areas you need to fix.
	
	If they have a positive stereotype, then enhance it.
	
	[At the end of this discussion, you should have made the following points:
	  • *Customers can get emotional.*
	  • *Emotion often is the result of mistrust or fear.*
	  • *The skills from Crucial Accountability provide effective tools for returning to meaningful dialogue.*
	  • *Listen, listen, listen to understand what customers need and want.*
	  • *Stereotypes can be positive or negative. Positive stereotypes can sometimes be hard to live up to. Negative stereotypes can be hard to live down. Again, listening and Crucial Accountability skills are the best tools we have.]*
	
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Availity Quality Service Standards

Lesson Three

Focus on the Standards

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Quality Service Standards

Service Standards are the result of careful analysis of our purpose as an organization, our customers, and the economics of our business.

The Availity Quality Service Standards are organized into a _____ that informs any tie-breaker situations.

Security

Dependability

Simplicity

Innovation

We focus on ⎰ **security** ⎱ at every touch point for every
⎰ **dependability** ⎱ customer—providers, payers,
⎰ **simplicity** ⎱ vendors, and internal customers.
⎰ **innovation** ⎱

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Availity Quality Service Standards

LESSON THREE:	Focus on the Standards
<image placeholder> **Lesson Three** **Focus on the Standards**	So we know why we need a culture change to make quality service a priority, and we have identified our customers – their needs and wants. Now we are ready to dig in to the Availity Quality Service Standards. I'm sure you've noticed that we are not calling this effort "training". Too often training becomes something we call a "one and done" exercise – just an event where you may or may not find nuggets to assimilate into your daily way of doing business. In order for Availity to improve, as an organization, each of us needs to think about providing service, communicating with our customers in a different way. So this is not a reminder to treat customers well, this is a call to action to rethink everything you do or say that touches customers. **->**
<image placeholder> **Quality Standards** An in-depth analysis of purpose, customer, and economics should result in clearly defined quality standards To be effective, Quality Standards must be organized into a clearly understood hierarchy that informs any 'tie-breakers'	Refer to **page 13** in your workbook. We have identified 4 primary standards, with qualifying descriptions. As the slide says, the standards are organized into a <u>hierarchy</u> that informs any tie-breaker situations. **Why would we put the standards in a hierarchy or priority order? What do you think I mean by 'tie-breaker' situations?** The number one standard must be considered above everything else. At Disney, that standard is safety. Although it's important to them to maintain the show aspect of the Disney experience, their first thought is always for the safety of their guests. Staying in character and helping guests have a great time, but that quality standard takes a back seat when a guest is doing something dangerous to himself or others. Safety breaks the tie. **->**

Availity Quality Service Standards

Security

I am...	when I...
aware	• Manage what is being sent and received in my email, use secure messaging, and do not fall prey to phishing and scams. • Follow security protocol and validation when exchanging information; follow security protocol to verify and validate account/user before helping, making account changes, accessing payment information, terminating or activating an account, etc.
cautious	• Do not share proprietary information. • Ensure that non-disclosure agreements (NDA) are completed. • Display my employee badge and require others to do the same; ensure only allowed personnel enter our offices. • Send system access information – user ID and password – in separate communications; send emails securely when PHI is included. • Help users set up for self-service options. • Link to secure, protected data vs. uploading it.
compliant	• Report potential breaches as soon as they occur and complete non-permitted disclosure reports. • Follow the code of conduct and ensure compliance courses – new hire and refresher – are completed timely. • Ensure any login credentials ae not shared. • Keep my desk clear and information put away. • Deliver services that adhere to all security and encryption rules and regulations.

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Availity Quality Standard - Security

Aware

Cautious

Compliant

At Availity, our primary, overriding standard is Security. **Page 14** in your workbooks provides an explanation.

This choice probably seems obvious.

Why would the team choose security as the first in the hierarchy of standards?
[*Participants should very quickly contribute that our access to PHI and PII requires us to always be vigilant about protecting that information. Secondarily, our owners and customers expect that as well*.]

A focus on security must drive all other actions or conversations. For each of the Standards, we have chosen descriptive words and phrases. When you are making security a priority, you will be aware, cautious and compliant.

Take a few minutes to look over the statements that support Security that are in your workbooks.

Which ones resound the most to you?
[*Use this opportunity to help participants make the connection of how they need to live out the Security standard in their own job. It will probably be different for each attendee or job position.*]

What are some examples of ways Availity makes security our number one consideration?

Highlight or underline one or two statements that are most relevant to you and your role.

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Availity Quality Service Standards

	EXERCISE: At your table you will find some post it note pads. Write down at least three ways you think we do or we should make security our number one Quality Standard. When you have your three (or more) get up and stick them to the 'Security' flip chart. [*Fold back the first sheet of the appropriate flip chart pad so that they can see it labelled: SECURITY. There should be a line drawn down the middle with one side labeled "Are" and one side labeled "Should". This will be the same for the flip charts for the other standards. Allow about three minutes for participants to write down their ideas and stick them to the pad. Once the participants are seated again, review each note posted to the chart (or if it's a large group, just select a few to save time). Ask if there are any others, and if some are volunteered, ask one of the participants to record it and post it to the flip chart*.]
	We have a responsibility to customers and to their eventual customers to protect and safeguard the information we handle, so it should not be a surprise that the foundational quality standard for Availity is security. **What questions do you have about the Security Quality Service Standard?** ->

Availity Quality Service Standards

Availity Quality Service Standards

	Touchpoints	Actions
Internal Customers		
External Customers		

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Availity Quality Service Standards

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How will you make a difference?

Internal Customers	Touchpoints	Actions
External Customers		

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We've identified some general ways Availity does or should focus on security and some behaviors that reflect consideration of security, but how about you?

How can you make a difference? What do you need to do differently to apply the quality standard of Security?

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EXERCISE: In your participant guide on **page 15** you will find another grid similar to the one you completed with customer names and touchpoints. I want you to look back at the notes you made on the original grid and transfer at least two internal and two external customers to this page. Bring along with the customer names at least two touchpoints for each. When you are finished, you should have the names of four customers and eight touchpoints. That's part one.
[*Depending on how alert and attentive your group seems, you may want to have the group complete this portion of the exercise before you give them the second set of directions*.]

Now for part two. Once you have selected your customers and touchpoints, give some thought to what actions you can or need to take to ensure that you are addressing the quality standard of security. This might be the most important work we do today, so I'm going to give you 15 minutes to think and make your notes.

[*Be available to the participants to help them think through the exercise. We are asking people to shift the way they think about their work and their relationships with customers. It may not be easy or quick. If some seem stuck, ask for permission to throw out the touchpoint and client to the large group for some brainstorming and idea generation*.]

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Availity Quality Service Standards

Dependability

I am...	when I...
responsive	• Am proactive, not reactive. Think ahead on actions I take; ask myself how what I do impacts others. • Reply to emails and phone calls before expected. • Check-in, even if I don't have an answer yet; reassure my customer. • Listen to my customer and respond thoughtfully.
quality –focused	• Provide options and the right fit for customers and stakeholders, incorporate quantified customer feedback whenever possible. • Commit to realistic expectations and meet or exceed them. • Am punctual; start and end on time. • React positively. Don't react to negativity or challenging situations with more negativity, back chat, or bad tone. • Share project delays early so stakeholders can adjust; maintain an excellent track record whether it's related to a project timeline, system availability, or defects. • Test thoroughly – code, communication, user experience – for 'happy' and 'unhappy' paths.
efficient	• Use staff and resources wisely; maximize time without minimizing morale. • Provide clear, consistent direction; remember to share changes in the direction in a timely manner. • Set realistic timeframes for promised tasks, activities, development, and more. Monitor regularly and report out delays before they get excavated. • Get upstream, downstream, and side-stream stakeholders in mind.

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Availity Quality Service Standards

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Availity Quality Standard - Dependability

Responsive

Quality-focused

Efficient

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The second in the hierarchy is Dependability, and includes the adjectives responsive, quality focused and efficient.

How do you think dependability plays out in our environment?
[*Lead the participants in a discussion of the clarifying statements in their workbooks so that they realize dependability does not just mean that software functions and is dependable. It can mean different things to different people.*

Ask if anyone in the class can define 'happy' or 'unhappy' path. If an explanation is needed, share that these are development terms. The 'happy' path is the series of tasks/steps/code that take place when everything goes well and as expected. At Availity, to provide dependable software, we need to also address the 'unhappy' path – the path things take when all does NOT go as planned. When things go wrong. We cannot write software only for the 'happy' path. Our products and services need to address all possibilities.]

What are we doing as a company that shows we are living up to dependability?

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EXERCISE: *Refer the participants to the post it note pads again and ask them to add examples of dependability to the correct flip chart. Review the suggestions and make sure they understand that they have personal responsibility to be dependable. That could manifest as returning phone calls promptly, providing updates as promised, being on time and prepared for meetings. The examples may reflect what we are doing as a company or specific to what employees are doing as a team.*

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Remember, we need to be prepared to demonstrate our standards at every touchpoint.

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What examples can you think of where our service related to dependability was not all it should have been? Internal? External?
[*Promote a discussion of any examples participants can give of a service breakdown related to Dependability.*]

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Availity Quality Service Standards

Availity Quality Service Standards

	Touchpoints	Actions
Internal Customers		
External Customers		

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Availity Quality Service Standards

	EXERCISE: Based on the examples we discussed and the information in your workbooks, spend the next three to four minutes completing the grid on the following page. **What actions can you, or should you take to ensure you are providing dependable service and solutions to your internal and external customers at every touchpoint?** ->

Availity Quality Service Standards

Availity Quality Service Standards

Simplicity

I am...	when I...
consistent	• Have clearly defined processes and help others be successful with them. • Can tell the full Availity story from all perspectives; prepare myself in advance. • Strive to create parity, intuitiveness, and aligned approach across platforms – bridging standards between and within products. • Understand how to and make the user experience intuitive.
transparent	• Collaborate and show a willingness to remove silos for the sake of simplicity. • Educate customers; provide meaningful self-service and support options; offer one login for all tools. • Keep pricing models straightforward, deliver invoices with no surprises. • Remember to share information with partners with appropriate transparency.
intuitive	• Understand customer needs, stay sensitive to those needs, and use reliable language. • Bridge the gap between customers and stakeholders – including terminology, variety of tools, messaging, education, and more. • Create less work for my customers. Help others gain/save time. • Deliver targeted, timely messages and tools, in plain language, to the right audience. Be respectful and self-aware of how I share information with my customers-my tone, type of information I share, and questions I ask matter.

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Availity Quality Service Standards

Availity Quality Standard - Simplicity Consistent Transparent Intuitive	Third on the list of Availity standards is Simplicity. When we are providing solutions and services that are simple, we will be consistent, transparent and intuitive. Let's look at some examples of behaviors that demonstrate our focus on quality service related to simplicity. [*Refer the participants to* **page 18** *in their participant guides and briefly discuss the list*.] Now we can continue to build out our labelled flip charts. [*Turn to the sheet labelled Simplicity on the third flip chart. Ask for a volunteer to write down the examples shared by the class. A second volunteer can stick them to the flip chart*.] **Who can share an example of how simplicity should play out in relationships with their customers?** [*Make sure participants are thinking of how they can provide service that is simple for their customers. Examples might include, user interfaces on the portal that are user friendly and intuitive; processes for doing business with Availity, requesting changes and updates should be consistent; meetings and all communication whether written, on the phone or in person should be transparent and without hidden meanings*.]
	What examples can you think of where we have not had a proper focus on Simplicity? [*Promote a discussion of any examples participants can give of a service breakdown related to Simplicity. As always, try to get participants to describe examples that relate to internal and external customers*.]

Availity Quality Service Standards

Availity Quality Service Standards

	Touchpoints	Actions
Internal Customers		
External Customers		

Availity Quality Service Standards

	EXERCISE: Now consider and record specific actions you need to take to be sure your service and products are simple, for your customers at every touchpoint. Feel free to get up and refer to the examples provided by the class that are posted on the flip chart. ->

Availity Quality Service Standards

Availity Quality Service Standards

Innovation

I am...	when I...
collaborative	• Extend trust and am trustworthy with colleagues and partners. • Give respect to everyone to share ideas; strive to blend approaches. • Welcome diversity and foster a safe environment for inspiration to grow. • Break down silow to share towards an aligned view and customer experience.
creative	• Explore creatively and empower others to do the same. • Use trends to help guide future innovation while respecting history and standards. • Use observations about customer pain points to improve customer experiences.
forward-thinking	• Thoughtfully research and apply trends with the customer experience in mind. • Create new boxes to think outside of – with the customers' needs in the forefront. • Have an open mind to newness while keeping logic and return-on-investment in view.

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Availity Quality Service Standards

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Availity Quality Standard - Innovation

Collaborative

Creative

Forward-thinking

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Our fourth Quality Standard is Innovation. Although it is last in priority, it is still a key area of focus for Availity.

Where have we seen a reference to 'Innovation' before?
[*Participants should remember that one of our core values is 'Customer Inspired Innovation'.*]

When we are innovating for our customers we will be collaborative, creative and forward-thinking.

So how many of you feel that innovation applies just to development teams? Maybe product?
[*It is wrong to think that innovation is the sole responsibility of product or the development teams.]*

If we are providing quality service at every level, then each department needs to be looking for innovative ways to meet customer needs and provide better service.

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What are some examples of innovation?
[*Once again ask the participants to write their examples on the post it notes and stick to the flip chart pad. When everyone has posted their responses, review each with the class*.]

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What examples can you think of where our service has not been innovative?
[*Promote a discussion of any examples participants can give of a service breakdown related to Innovation.*]

How has our company been innovative internally and externally? What about the new building?

Let's look at some examples of behaviors that demonstrate our focus on quality service related to innovation.

If you're thinking someone should improve something, you may be that someone.

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Availity Quality Service Standards

Availity Quality Service Standards

	Touchpoints	Actions
Internal Customers		
External Customers		

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	EXERCISE: Now one last time, complete the grid on page 21 in your workbooks and make notes on the actions you can, and plan to take to include innovative thinking into your service delivery.
	Now you have a series or list of actions to take to help you focus on for each of the quality service standards, I'd like for you to look back at your lists and circle at least one for each standard that you will commit to change when you badge in to the office tomorrow morning. [*Circulate around the room to be sure everyone is reviewing their lists and circling the actions they will focus on. It's important for them to end the day with a clear path for making a shift in their thinking about service delivery. This is the first step.*]
	Who is willing to share one of their areas of focus? [*Try to get four or five participants to share at least one goal. You want them to make a public commitment to follow through on what they are learning. Ask for specifics about what the action will look like and what change(s) the participant will have to make in their everyday work. Congratulate and thank anyone who is willing to share with the large group.*] **->**

Availity Quality Service Standards

The order of the standards is critical to providing great service.

Security must be the primary driver of everything we do.

What good is a service provider who is not **dependable**?

It must be **simple** to do business with us.

Customers look to us to provide **innovative solutions** to their problems.

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Availity Quality Service Standards

	So now you know the four Availity Quality Service Standards. Remember the order is important. **->** **->** Security must be the primary driver of everything we do. If we do not provide security in our software development, support and communication, we cannot hope to have trusted relationships with our customers. **->** Second is dependability. What good is a service provider or partner who is not dependable? Think of your own experiences as a customer. You don't want to do business with someone who is not reliable. **->** Third is simplicity. We need to always be thinking of making it easy to do business with us. **->** And fourth is innovation. Our customers look to us to solve their problems with fresh and original ideas.

Availity Quality Service Standards

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Availity Quality Service Standards

	The order of the standards is critical to providing quality service. **For instance, wouldn't it be simpler if we had fewer steps for logging on to the portal? Could we make points by removing some of the tedious log in steps?** [*Encourage discussion but be sure the following is the result of the conversation.*] It might be simpler, but don't forget the order of the standards has been carefully considered. We cannot offer solutions or ideas that are simpler if they negatively impact security. As an organization, we are making a commitment to focus on Security as a number one priority. That thinking applies to the fourth standard as well. Innovation is another market differentiator. But innovation cannot negatively impact security, dependability or simplicity. Keep thinking of how you can apply these standards to each touch point. You can be off task, but not off purpose, such as when you may have to put security over a task that was demonstrating dependability. [*To drive home the point, share the Disney parade example (if a person gets in way of the parade barrier then safety trumps courtesy.*] **Remember, also that we work collaboratively with others. Think of some of the people you depend on. How can you work together to make our service better?** [*Lead a discussion to help all participants identify at least one coworker or team they should work with to improve service on at least one standard. Prompt them to note the name/team in their workbooks so they can remember to reach out to that team or person tomorrow.*] **->**

Availity Quality Service Standards

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Availity Quality Service Standards

	While the quality service standards are new, our intent to focus on these things for our customers is not new. Our Quality Service Standards align with and support our long standing Availity Core Values. Even if you are new to Availity you have seen our Core Values on SharePoint and as a part of our LOVE program. These Quality Service Standards support our commitment to build trusted relationships and deliver the best results for our customers. Open and inclusive dialogue is a part of providing dependable service and delivering on a commitment to make it simple to work with use. Customer Inspired Innovation is practically a direct match to our fourth Quality Service Standard of Innovation. The Standards support our Values, and our Values support our Standards. [*Refer participants to the Resource section if they want more information on the core values*.] **->**
	Together they prepare you to deliver on Availity's Common Purpose to make health care easier by delivering the right information at the right time and in the right place. We have to be aligned with our purpose. **What questions do you have about the any of the Quality Service Standards or how you can personally apply them?** **->**
	We've done some great work so far and there's just a bit more planning we need to do. Let's take a 10 minute break and then continue. [*Allow at least a 10 minute break. Be available during the break to answer questions*.]
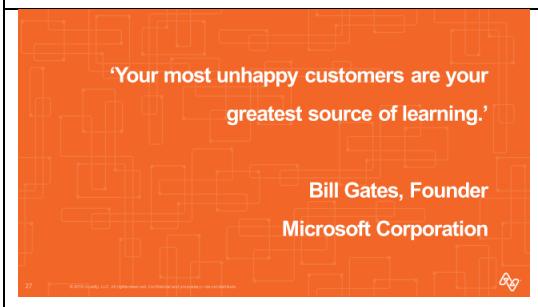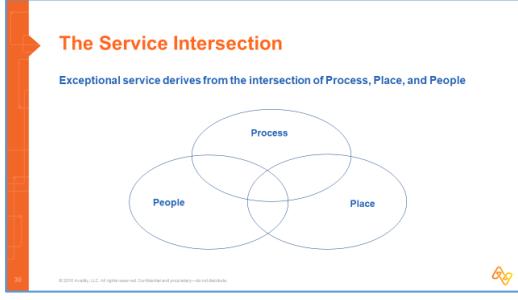
# Availity Quality Service Standards

Lesson Four

Service Recovery – a roadmap

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Availity Quality Service Standards

LESSON FOUR:	Service Recovery – a roadmap
	-> If you took the time to read the quote on the projector a moment ago, you might have guessed that our next lesson topic is about what to do when things go wrong. Does everything always go as planned? No. You can't control all outcomes, but you can control how you react when things go wrong. How do we typically act? Yes, we react. "The person who cuts me off in traffic is a _____." When things go wrong, we have an opportunity to make things right through the actions we take next. So we know that things will go wrong. The magic in preserving the customer relationship and trust is in how you handle those mistakes or errors. To help you figure out the best strategy to move forward and recover from a bad situation, we've done some work to create an Availity Service Recovery model. Let's talk briefly about how we got there. **->**
	In this model, you can see that the intersection of service is where processes, people and places come together. Service can go wrong in any of these areas. **So thinking through this graphic, who do you think is at fault when things go wrong?** Service recovery is all about turning situations that may initially be negative into positives by how they are handled.

Availity Quality Service Standards

The Service Intersection

```
        Process

  People        Place
```
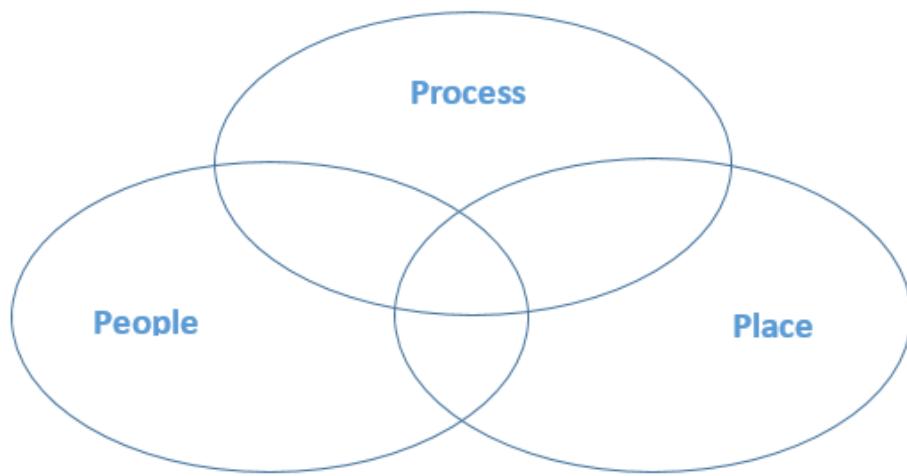
When People, Process, and Place align, we experience exceptional service. But all too often, things go wrong.

Select one internal and one external customer.
What people-process-place inputs could impact service to them?

People	Process	Place

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	Picture this (back to our restaurant example: You are at a nice restaurant and waiting on your food order. While you are waiting, a waitress walks by with a tray of drinks and spills a strawberry margarita on you and your table. She then disappears - never to be seen or heard from again. So picture the situation… you are stuck at a table with strawberry goo covering your table and booth so you can't move without sliding through it, and no one is coming to assist you. Would you go back? What are your thoughts about the overall experience? But what if the waitress apologized, helped clean it up, comped your meal, and offered to pay for the dry cleaning? How does that change the experience? It may still be a negative, but the overall experience has changed because they took ownership of the problem and worked to correct it.
	EXERCISE: *Ask the participants to reference page 24 in their workbooks. Have them identify one internal customer and one external customer, then list the people, process or place inputs that could affect whether or not it all aligns to provide quality service. Allow 5 minutes to complete the lists then ask for a couple of volunteers to speak through either their internal or external example.* **Where would you expect the challenge to exceptional service to come from in your example? People, place or process?**
	If you have time…. *Refer the participants to the Service Delivery Matrix in the Resources section, page 34. Allow them 10 minutes to complete this matrix for the internal or external customer they feel is the most demanding or may be at risk at the moment. Once they have completed the matrix for the one customer, debrief by asking if they found the exercise valuable. Do they have a better sense of what this customer might need or want? Having completed this exercise, could they now provide better service? If they answer, yes, challenge the group to complete this matrix for other customers they need to manage better.*

Availity Quality Service Standards

Availity Quality Service Standards

Service Recovery Process

"It may not be our fault, but it is our problem."

Major Step	Sub-Steps
1. Apologize and establish your intention to help* *This step should occur as soon as possible following the incident.	• Be apologetic and empathetic • Gather information • Be flexible • Show interest • Be open-minded • Master your stories
2. Get the facts	• Ask questions • Assist the customer in identifying needs and expectations • Determine whether you understand the problem • Make sure you understand the facts and the customer's needs
3. Develop solutions or manage problems you can't solve	• Solicit input into finding adequate solutions • Consider what alternatives are immediately available • Involve other internal departments, if applicable – service recovery is everyone's accountability
4. Implement solutions	• Explain what you are going to do • Assess whether this meets the customer's needs • Make restitution if appropriate • Thank the customer for bringing this to your attention
If you can't solve the problem	• Always use good service skills, whether you can or cannot personally solve the problem • Make a commitment to follow up with the customer • If you cannot remedy the customer's problem, quickly involve others who can – service recovery is everyone's responsibility • Report chronic service or product problems to applicable departments and managers • Provide assistance for solving consistent departmental or company service or product problems

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Availity Quality Service Standards

So regardless of who or what is to blame and despite our intentional service delivery, we can all agree that bad things are going to happen. When things go wrong, we need a recovery safety net – some way to address the issue and get things back on the right track again.

->

The Availity Service Recovery Process can be found on **page 25** in your workbooks.

The purpose of a predefined recovery process is not to relieve you of responsibility or create a list of tasks for you to check off so you don't have to think. Instead, a process can help you get started down the right path to resolving a negative situation and hopefully, prevent it from getting worse.

When we are under pressure or stressed, it's easy to misstep or misspeak your intentions. Sometimes we forget to listen and may start trying to fix what we perceive to be the problem when in fact the customer's biggest concern lies someplace else.

Use this process to help you think through the possibilities, remind you to listen and take appropriate actions at the right time.

The first step is to apologize. You can apologize that the customer is having a problem, leading to a frustrating day, without admitting or saying that the issue is your fault. Whether it is your fault or not, it is your problem. The bottom line is that because of the complexity of our business, you may often be in the position of dealing with a customer's frustration or anger about something that is totally not your fault-but is your problem to resolve.

When a child's ice cream cone falls apart it is clearly not the ice cream vendor's fault, but the crying child is the vendor's problem. So what do they do? They give the child another ice cream cone.

We have similar occasions when a service failure may be due to a process failure at a payer or a vendor. It isn't our fault but the customer is making it our problem. An apology for the situation the customer is experiencing is an easy way to sometimes calm the situation. Calmer customers can provide better information on what you might actually be able to do to help. The worst thing you can do is to try to deflect blame and minimize the customer's frustration.

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Availity Quality Service Standards

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Availity Quality Service Standards

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Availity's Service Recovery Process

If **you** can't solve the problem…

- Always use good service skills, whether you can or cannot personally solve the problem
- Make a commitment to follow up with the customer
- If you cannot remedy the customer's problem, quickly involve others who can – service recovery is everyone's responsibility
- Report chronic service or product problems to applicable departments and managers
- Provide assistance for solving consistent departmental or company service or product problems

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And what about the times when you cannot solve the customer's problem? It could be an outage at the payer, or a vendor mistake.

The Service Recovery Process provides some direction here also.

As with the other steps to recover service, the key is to communicate open and honestly with the customer and to follow up to be sure that the customer has been taken care of.

What questions do you have about the service recovery process? Is there anything here you disagree with?

[*Allow participants to discuss the process and to ask any clarifying questions they might have. The goal is to provide a framework for directing their thought processes when something goes wrong. The key take-away is that a problem may not be Availity's fault, but if our customer is unhappy, it is our problem.*]

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Skill Builders

Foreword by Stephen R. Covey

crucial
conversations
Tools
for talking
when stakes
are high

KERRY PATTERSON, JOSEPH GRENNY, RON McMILLAN, AL SWITZLER

THE *NEW YORK TIMES* BESTSELLER

crucial
accountability

Tools for Resolving Violated
Expectations, Broken Commitments,
and Bad Behavior

PATTERSON · GRENNY · MAXFIELD · McMILLAN · SWITZLER

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How many of you have taken the Crucial Conversations or Crucial Accountability training?

If you have not had this training, you should sign up right away. These courses are loaded with repeatable processes for finding ways to safely disagree with a customer while still making the necessary efforts to resolve an issue.

The importance of listening – listening to understand – cannot be overstated in the service recovery process.

And another thing to remember from Crucial Accountability or Conversations training is to master your stories.
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Availity Quality Service Standards

To provide better service, *Master your Stories*

A meaningful dialogue depends on a *Pool of Shared Meaning*.

People who are skilled at dialogue, make it _____ for everyone to add their meaning to the Pool of Shared Meaning.

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Availity Quality Service Standards
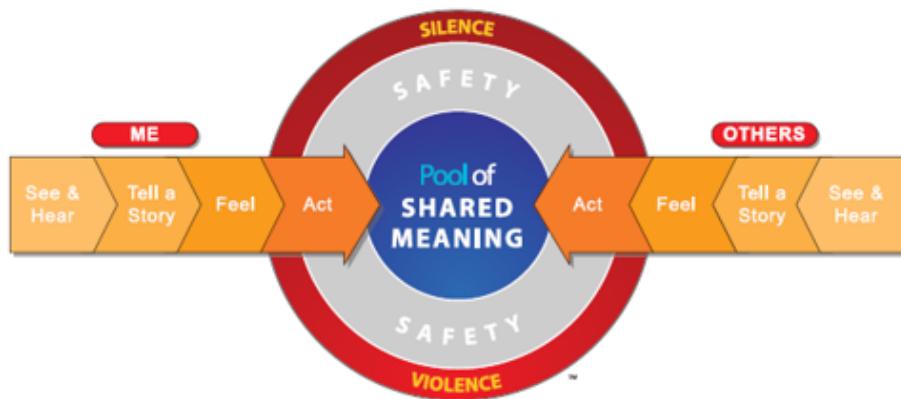
Master your Stories	**Who remembers what it means to 'master your stories'?** [*If possible, allow a participant to explain this concept to the class. Since we only know one side of the story (our side), we need to ask questions for clarity, repeat for understanding and reinforce until we have a full picture of what happened and how trust and confidence can be recovered. Ask if someone can provide an example. If no one in the class feels confident enough to lead the discussion, discuss the points below and ensure everyone understand how Mastering their Stories can positively impact service and service recovery.*] Remember our example about the person who cut me off in traffic? **Can you think of any valid reasons why someone might be driving erratically?** [*Possible examples: person is on the way to hospital, they are new in town and didn't know the lane ended, etc*.] You don't know everything about that situation and admitting it to yourself can change how you react.
	[*Share information on how to Master Your Stories, as needed*.] Each of the participants in any conversation have a 'path to action'. In the graphic you can see the path under labels for both 'Me' and 'Others'. Two people may see or hear the same thing, but the story they tell themselves will be different. It will be different because we all have different backgrounds, experiences and prejudices. The stories we tell ourselves cause us to have feelings and our feelings have direct impact on how we act. Stories provide the rationale for what's going on, how we interpret what's happening around us, they create our Pool of Meaning. Approaching things with curiosity can change your actions. On the other side of the conversation, the same thing is happening. When it is time to act, there is very little chance that a customer's Pool of Meaning will match ours. At that time it's necessary to establish safety and master your story. People skilled at dialogue make it safe for everyone to add their meaning to pool and grow the pool so that everyone has invested in the Pool of Shared Meaning. At this point, there is no judgement and facts can be evaluated honestly without the baggage of stories that are not pertinent to the issue. The larger the pool of shared meaning, the greater the likelihood for agreement and creation of solutions that satisfy all sides.

Availity Quality Service Standards

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Availity Quality Service Standards

	Another important thing to remember is to continue to apply the Quality Service Standards in the recovery process. Any solutions you offer must provide safety. "People who are skilled at dialogue, make it <u>SAFE</u> for everyone to add their meaning to the Pool of Shared Meaning." Customers will want to feel they can depend on your ability to resolve the situation OR to find someone who can. Be transparent and don't over commit or promise. If you can't give them the solution they want, tell them clearly what you can do, and when you can do it. Communication and follow up are as necessary as listening to successfully resolve conflict and service disruption.
	EXERCISE: [*Bring out a jar or other container with six service failure examples. Ask for a volunteer to select one from the container and walk the large group how s/he can use the Service Recovery Model to resolve the issue.* *Use all the examples and ask the class if anyone has another example (perhaps from a previous experience) they would like to bring up so the class could help create a workable plan*.]
	What questions do you have about the Service Recovery process? You should keep this process handy so that you have quick access to it should you be in the uncomfortable situation of a service failure. **->**

Availity Quality Service Standards

Lesson Five

Integrating it into our Availity Culture

27

Integrate the Quality Standards into your everyday practice

START	STOP	CONTINUE

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Availity Quality Service Standards

LESSON FIVE:	Integrating it into our Availity Culture
	We have one final step, but it is perhaps the most important thing we will discuss today. **How will you translate these ideas and this learning into your everyday activities?** If each of us does not make it a personal responsibility to change the way we approach customers – internal and external – we cannot hope to reach the 2019 objective of becoming a market driven and high performing product and service organization . ->
	EXERCISE: In your workbooks after each Service Standard, you already recorded a list of actions you could take to apply the Quality Service Standards in your work. You even circled the four that you think are most important for you to start doing immediately. Now I want you to take 5 minutes to transfer those to the Start-Stop-Continue page in your workbooks, **page 28**. Once you've completed the START portion of the Integrate page, list at least two things you feel you should STOP doing. They may be daily activates, they may have something to do with the way you handle conflict or service delivery failures. I'm sure you can think of two things you should stop doing. Finally, based on our discussions today I'm sure you felt good about three or four behaviors or activities you do on a regular basis that support the quality standards. Remind yourself of those and list them as things you need to CONTINUE to do. [*Allow as much time as needed for participants to complete the page. This is an important part of internalizing and committing to follow through on what they've heard and discussed. Once everyone has finished, ask if you can get a couple of participants to volunteer items from their lists*.] ->

Availity Quality Service Standards

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	That's great work and thanks for your personal commitments. Now we are asking for your help. You have a personal responsibility to make sure these new standards become a part of you and your way of working, and Availity has a responsibility as well. The company needs to support and reinforce these standards, as well as the Service Recovery Model. We'd like to get your ideas for what the company can do to help remind you of your new responsibilities and commitments. I'd like to spend a few minutes of our remaining time together to come up with 5 ideas we can pass along to leadership. [*Be flexible in how the group would like to do this. If you have time, you might want to break into smaller groups to create a list of things they put on a flip chart and then review with the large group. Or, if you are pressed for time, throw out the exercise to the large group and get someone else to facilitate discussion or do it yourself. By now you should be able to read the group to see which method would work best. At the end of the exercise, you want to have about five suggestions the entire class agrees to.*] ->
	Thanks! These are great suggestions. I can't make any promise or commitment as to how many we will be able to initiate, but I appreciate your out of box thinking. Remember there are also Service Ambassadors who will be routinely reinforcing and calling out behaviors that support the Quality Standards. One more thing to share. ->
	At the back of your workbooks is a Resources section. In it you will find some one-page reminders on telephone etiquette, written communication guidelines (including email), conference call etiquette and the like. We trust that you can read and refer to this information as you need to. If you have any questions about our discussions today, the best way to integrate the Quality Service Standards into your day to day operation or about resolving service mishaps, please do not hesitate to reach out to your manager, Kristina, Brian or Denise.

Resources

"It may not be our fault, but it is our problem."

Major Step	Sub-Steps
1. Apologize and establish your intention to help* *This step should occur as soon as possible following the incident.	• Be apologetic and empathetic • Gather information • Be flexible • Show interest • Be open-minded • Master your stories
2. Get the facts	• Ask questions • Assist the customer in identifying needs and expectations • Determine whether you understand the problem • Make sure you understand the facts and the customer's needs
3. Develop solutions or manage problems you can't solve	• Solicit input into finding adequate solutions • Consider what alternatives are immediately available • Involve other internal departments, if applicable – service recovery is everyone's accountability
4. Implement solutions	• Explain what you are going to do • Assess whether this meets the customer's needs • Make restitution if appropriate • Thank the customer for bringing this to your attention
If you can't solve the problem	• Always use good service skills, whether you can or cannot personally solve the problem • Make a commitment to follow up with the customer • If you cannot remedy the customer's problem, quickly involve others who can – service recovery is everyone's accountability • Report chronic service or product problems to applicable departments and managers • Provide assistance for solving consistent departmental or company service or product problems

Resources

Resources

CREATING Safety During Conversations

People need to feel safe before they will contribute their thoughts, ideas, and feelings with another. So how do you create safety in a situation where there may be unpleasant things to discuss?

Before the conversation begins….

Creating safety starts long before the first word is spoken. Spend some time thinking about why you are going to have the conversation and how you can create an environment that encourages open dialogue.

Step 1: Determine what the conversation is really about

Is this a conversation about a single instance? Is it a conversation about a pattern of missed service opportunities? How is the situation making the customer feel? What is the impact to trust?

Hint: If you find you or the customer are getting more upset during the conversation, you are typically addressing the wrong issue.

Step 2: Start with Heart

What do you really want? (If your intent is not clear to you, how can you make it clear to someone else?)

What does the customer really want? (Have you considered what external pressures might be driving the customer's needs? Behaviors?)

Step 3: Master your Stories

Avoid telling yourself a 'story' about why the customer is acting or believing the way they do. There may be a number of reasons and you simply do not have all the information.

Focus only on the facts, not the story you are telling yourself.

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Resources

RESTORING Safety During Conversations

When safety is at risk, it must be restored before any true dialogue can occur. You may have to step out of the conversation and work to restore safety before continuing.

Step 1: Make it Safe / Restore Safety

Clarify your intent

People rarely become defensive about <u>what</u> you are saying (content). They become defensive because of <u>why</u> they think you are saying it (intent).

A simple way to avoid misunderstanding is to simply say what you **DO** intend and **DON'T** intend.

Example:

> *This conversation is not about rehashing every little production issue. It is simply a conversation about this past release and where there may be opportunities for us to improve our process working together.*

> *It is not my intent to have this be a one-sided discussion. I would like your views on how things are going.*

Step 2: Create mutual respect and mutual purpose

Respect is a necessary condition for dialogue. Another way to look at it is…

"Respect is like air. You don't notice it until it is gone. Then it is all you notice."

Show that you respect the other person and try to find a way to create a mutual respect and find a mutual purpose.

Step 3: Ask them to share

Encourage the other person to share their views, feelings, and ideas. Showing that you value their opinion may be enough to restore safety.

> *I would really like to hear your thoughts.*

> *How do you see things?*

Be ready for the answer! If you ask a question, be ready for their response. It may not be what you expected or wanted to hear, but that is okay. The point is to have an open and inclusive dialogue with both sides adding their viewpoints. Only when both sides of a discussion feel safe to add their meaning, can true dialogue occur.

6 Email Rules to Live by at Work

1. Get to the point fast. Limit introductory phrases. Use bullets as much as possible.

2. Reply to emails in a timely fashion.

3. Keep email focused on business problem at hand. Don't rehash old business.

4. Proofread (at least once) and spellcheck emails before you press send.

5. Do not reply to all unless 'all' really need to know the content of your email.

6. Avoid Bccing.

Telephone Etiquette

Phone conversations are just as important as face-to-face conversations. Phone handling skills can resolve or escalate a conversation or problem.

- Answer the phone using a formal greeting. Always state your name and the name of the company.

- Speak clearly. Take the time to speak clearly and in a positive, professional tone. Doing so will put the caller at ease and is the first step to diffuse an upset customer.

- Listen and Learn. Listen carefully to customers. Always allow the caller time to finish his or her thoughts without interruption. Ask questions to clarify information and understanding. Be sure to confirm understanding with the caller before moving forward or hanging up.

- End calls with a final offer of assistance or commitment. Do not make a commitment you cannot keep but gain agreement from the customer as to what your next step will be.