

CUSTOMER SERVICE

FROM A TO Z

MAKING THE CONNECTION



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Though the guidelines contained in this text are based on consultations with healthcare professionals, they should not be considered absolute recommendations. The instructor and readers should follow employer, local, state, and federal guidelines concerning healthcare practices. These guidelines change, and it is the reader's responsibility to be aware of these changes and of the policies and procedures of her or his healthcare facility/agency.

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**O**ur patients and clients are special people to us. We want to give the highest quality care and do it in a way that meets their needs. Sometimes it is hard to think of patients and their families as customers, but when we do, we can be more clear about ways to customize our care. Patients have a choice about who cares for them. We want to be chosen. We want to be known for our caring and sensitive response to healthcare problems and people problems. We want to be connected to people ... to make a difference.

This SourceBook provides easy-to-teach content from A to Z for in-services, staff meetings, or newsletters. Interesting facts, a new way to see the customer, and ways to focus on internal customers make this a valuable resource for healthcare educators and staff.

To use this book, teach the first section, Take a Look at Yourself ... from A to Z, before teaching any other sections. This first section serves as an introduction. The rest of the book can be taught in almost any order. Some sections are longer than others, so you may pick and choose sections depending on their length and how much time you have. Almost every section can be tailored to suit your time restraints, areas of interest, and participant level. Be creative!

Throughout this book, we have used “patient” and “client” to stand for patients in hospitals, residents in long-term care, or clients in home care. The word “customer” applies to all of these as well.

In many of the sections in this SourceBook, optional prizes and decorations are suggested for rewards, motivation, or to make a point. Party stores and teacher supply stores are good sources for seasonal decorations all year round. Watch after-holiday sales to stock up on stickers or decorations you might use. The Resource List in the back of this book provides some other ideas.

We hope this SourceBook serves your customer service needs. If you have any comments or suggestions regarding this book, please let us know. We'd love to hear from you.

**Happy Teaching!**



# Take a Look at Yourself...From A to Z

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**Estimated Time:** 30 minutes

**Tools:** Handout 1-1 Customer Service from A to Z (assessment tool)  
Transparency 1-1 Can We Talk?  
Handout 1-2 Action Plan: Take a Look at Yourself

Optional: Heart shaped stickers to distribute at the end of the in-service to remind staff that customer service is the “heart” of your work. Introduce this idea again near Valentine’s day, give out heart-shaped candy, and decorate the classroom with hearts.

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**Learning Activity:** **Self-Assessment and Discussion**

**Distribute**  
**Handout 1-1**  
**Customer Service from**  
**A to Z**

This handout can be used at the beginning of customer service training, at the end of training, or periodically as a reminder. Try it in orientation to set the expectation that customer service is the heart of your work. Participants can keep these for discussion later or turn them in, leaving their names off, so that you can identify areas that may need some additional work.

Allow participants 15 minutes or so to complete the tool, writing “G” for great!, “N” for needs work, and “NA” if it doesn’t apply to their work.

**Display**  
**Transparency 1-1**  
**Can We Talk?**

Read the three questions and conduct a discussion about participants answers. Ask: “Who would like to share first?”

**Learning Activity:**

**Distribute**  
**Handout 1-2**  
**Action Plan: Take a Look at**  
**Yourself**

**Action Plan**

Whenever we do a self-assessment, it is a good time to make a commitment to change as well. Start a discussion about what participants think could be improved in customer service with patients and clients, family members, and staff. This helps them generate ideas about how they can change their own customer service.

Ask the following questions:

- What did you learn about yourself?
- What are you willing to work on to make things better?

Ask participants to think about what they have learned from this section, and tell them to complete the handout. Set a time in the future when they will be able to discuss the results of their efforts. Ask for volunteers to share what they have put in their contracts.

# Customer Service From A to Z

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**Rate yourself on the following.**

**G** for great!

**N** for needs work.

**NA** if you are not in a position to do this.

- A. \_\_\_\_ I take pride in my **Appearance**. I dress professionally and pay attention to my grooming.
- B. \_\_\_\_ I **Behave** professionally and remain calm in the face of anger.
- C. \_\_\_\_ I maintain **Confidentiality** and am careful not to talk about patients or clients in inappropriate places.
- D. \_\_\_\_ I look for ways to **Do** something extra to make staff feel appreciated.
- E. \_\_\_\_ I am careful to make **Eye** contact without staring.
- F. \_\_\_\_ I take time to answer **Family** members' questions.
- G. \_\_\_\_ My touch is **Gentle** when I am providing care.
- H. \_\_\_\_ I offer to **Help** co-workers without being asked.
- I. \_\_\_\_ I think of how **I** would want to be treated and am careful to cover a client and maintain dignity.
- J. \_\_\_\_ I watch my language and am careful not to use **Jargon** people might not understand.
- K. \_\_\_\_ I **Keep** my word and am careful not to make promises I am not sure I can fulfill.
- L. \_\_\_\_ I **Listen** patiently and don't jump in to offer quick advice.
- M. \_\_\_\_ I **Make** sure to explain procedures carefully.
- N. \_\_\_\_ I use the patient's or client's **Name** and try to remember it.
- O. \_\_\_\_ I am **Open** to feedback about how to improve my customer service.
- P. \_\_\_\_ I treat all **People** with respect.
- Q. \_\_\_\_ I answer the telephone and greet the caller as **Quickly** as possible.