Technical Training Associates Presents

Service Management Excellence

An E-Book By Jim Johnson

A Practical Approach To Managing A Service Department, Hiring Effectively, Supervising, Leading, Coaching and Mentoring A Service Team, Creating A Culture Of Customer Service, Communicating Effectively With Others, Understanding Different Personalities In The Workplace, Conducting Effective Meetings & In-House Training Sessions, and Implementing A Flat Rate Pricing System.

Service Management Excellence, By Jim Johnson

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SERVICE MANAGEMENT EXCELLENCE

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FORWARD: SERVICE MANAGEMENT EXCELLENCE

If you're a service manager of just about any ilk, there's a better-than-even chance that *one* of the reasons (there are many) you are in that position is because you were good at something else. That something else could have been installing or servicing heating and air conditioning equipment or appliances…or perhaps you started your career as a plumber, an electrician, an automotive technician, or in another trade. Whatever skills you demonstrated in your trade or area of technical expertise, that's what they were: Trade or technical skills. And, that's good. After all, everyone wants to advance in their career, and one way to do that is to assume a supervisory or management position.

There's just one problem with this process. In the same way that it's likely that you "moved up" to your present position because of your technical expertise, it's also likely that you moved into that position without a great deal of opportunity for training and preparation in the areas of communication skills, customer service, dealing with different personalities, managing people and leading a team.

And sometimes, getting the information that you need in order to be as effective as possible at your new (or maybe even not-so-new) position, can be a difficult and time-consuming task. Even attending a one-day workshop on supervisory skills can be a major undertaking when you consider not only the up-front expense of attending the training, but also what it takes for you to take the time off (meaning: "get away from the phone") so you can concentrate on learning new skills, and then find the time to follow up so you can put what you learned to practical use.

Take heart. This E-Book is for you. It's a no-nonsense approach to being an effective supervisor, manager, department head or small business owner. You're sure to find something that will give you the tools you need to get your job done.

We're going to give you information and practical tools on how to do that. Some of what you'll read here will be enjoyable, even a little fun, and simple common sense, subtle things that might make you think, "Hmmm…I'll have to give that a try". And some things will hit hard. So hard, that at first, you may be tempted to dismiss the idea altogether. That can be a normal response to new information that, on the surface, sounds either "too simple", "too radical", "too touchy-feely", or looks as though it might "sound OK in theory, but in the 'real world' won't work."

But we want to point out that everything in this E-Book has been put into practice by somebody, somewhere, and it has worked, not just in theory, but in practice.

Will you adopt every idea you read here….put everything into practice in every situation you deal with in exactly the way it's described? That's not likely. Nor is it likely that you'll agree totally with everything we say or suggest. That's OK. Just keep an open mind and take the time to pause when you need to and think about your specific situation, or a specific person in your organization, and how something we said can benefit you or provide you with some insight on what to do about a specific person or situation in your organization. And then take what you want and leave what you don't want behind. That's the way you'll get the most out of your investment of money and time.

SEGMENT ONE: TAKING OR STARTING OVER

A defendant was on trial for murder. There was strong evidence indicating his guilt, but there was no corpse. In his closing statement, the defense attorney decided that he had a foolproof way to ensure a verdict in favor of his client. "Ladies and gentlemen of the jury," he said. "I have a surprise for you. Within one minute, the person that everyone thinks is dead will walk into this courtroom."

He looked toward the courtroom door. The jurors were all stunned, and they sat transfixed, staring at the door. After a long minute, nothing happened. Finally the lawyer said, "Actually, I made it all up about the dead man walking in. But you all looked at the door with anticipation. So, that means you had reasonable doubt about the victim being killed, and if there is reasonable doubt, then you have to come back with a verdict of 'not guilty.'"

When the jury came back after a short deliberation, they said "guilty."

"What!" exclaimed the lawyer, "You couldn't arrive at that conclusion if you had any reasonable doubt, and I saw all of you stare at the door, which showed that you had reasonable doubt."

"You're right," said the jury foreman, "you looked at the door, and we looked at the door, but your client didn't."

Whatever your specific situation in service management and supervision, you're facing some challenges, (among them being the person responsible for making sure that everybody you supervise knows what they're supposed to do in any given situation) and you need to know how to meet them. So here you are…. Maybe your situation is that you've always kept a good work ethic, strived to keep learning, dedicated yourself to doing your job in the best way possible, and you've been promoted. You've made the decision to take on your new responsibilities because that's the way you move up the income ladder, the way you keep moving ahead in your career. Or, maybe you've made the decision to leave an employer and get your own business started, and part of that is hiring, supervising and managing employees. Or, maybe you're not exactly brand new at this management thing and you're looking for information on how to do your job or manage your business more effectively than you have in the past.

And sometimes there are things you need to know and consider that are, well, not exactly comforting to know or consider when it comes to supervision, but, as they sometimes say in Texas…"If you have to swallow a bucket of frogs, you might as well get the biggest one done first", so we'll start out with some of that less than comforting stuff.

Some Hard Facts About Service Management/Supervision….

…Management is not a popularity contest.

…Management is not easy. That's why many people either don't do it well, or don't do it at all.

…Often, the biggest personal challenges we face as supervisors is overcoming fears….the fear of change, the fear of failure, and the fear of not having complete control over our lives.

…The only real "job security" we have is our knowledge and skills.

…A supervisor's best protection against lawsuits (yes, you *hate* the idea of having to deal with this issue, but you know you might *have to* sometime) is <u>knowing the right thing to do and doing it consistently.</u> 73% of employee versus employer lawsuits are won by the employee and the amount awarded can often be in the hundreds of thousands of dollars.

…15% of your success as a supervisor is related to your technical skills.

…85% of your success as a supervisor is related to your people skills.

…People in a work environment don't want to be managed. People want a leader, and a leader has to lead by example. (No, you won't be perfect all the time and you can be sure you'll be reminded when you're not, so just accept that.)

…It takes more than a desire to make more money or advance in your career to be an effective supervisor. It takes dedication, hard work, being open to constant self-examination, and a willingness to consider what everyone, whether you report to them or whether they report to you, has to offer in the way of advice, suggestions, and criticisms.

And, the hardest fact of all…..

<u>…A service manager/supervisor has to be confident enough to gamble everything they own, and their future earnings, on their belief in their skills and abilities.</u>

Think we went too far with that last statement? We don't think so, at least from the pure perspective of an effective supervisor.

FACT: Supervisors are people who decide things. Sometimes they decide right, and sometimes they decide wrong, but they decide. And when you look at it from that simplistic perspective, it means that every time you decide, there's risk involved. It might be a low-level risk with an easy fix, or it might be a high-level risk, which means that, at some point in your career, there might be a situation in which you have to be confident enough to gamble everything on your belief in yourself.

We don't for a moment mean to insinuate that it's like gambling in a casino where the odds of the success of the house are heavily weighed against your success. We mean calculated risks. And calculated risks, while still a risk, are undertaken with skills as a support system. And there are 10 skills that will allow you to deal effectively with the hard facts we mentioned…. and allow you to take calculated risks. Here are those 10 skills:

1. Leadership
2. Hiring Wisely, Retaining The Best, and When Necessary, Sucking It Up and Firing The Worst.
3. Delegating
4. Time Management
5. Building Effective Teams
6. Coaching Effectively
7. Dealing Effectively With Negativity
8. Crises Management
9. Setting Goals
10. Developing Your Career Through Life-long Learning

You'll likely agree that the skills we've listed (along with a few others you can probably think of) are necessary for effective supervision and service management, and while it's easy to think "easier said than done" when considering a list like this at its face value, there's a simple, yet important point we want to make about understanding the process of developing the above-mentioned skills. There's an underlying philosophy to succeeding at it, and it's simple. The underlying philosophy that will allow you to develop these 10 skills is the willingness to accept responsibility.

Some people may harbor the belief that that it's difficult accepting responsibilities, that some people just "aren't cut out" to take on the challenges of accepting responsibility. But, here's a simple way to think about it. Anyone who thinks that accepting responsibility is difficult or complicated, needs to consider how much responsibility they accept every time they get behind the wheel of a car. Everyone who drives a car accepts the responsibility to do several things simultaneously, and do them just right all the time. And the bottom line on driving is that if someone isn't simultaneously doing all the things it takes to drive a car, and doing them just right consistently, the end result is disaster.

So, if you're one of the approximately 95% of the population, who regularly engage in, (or at one time accepted the responsibility of) driving an automobile, you're already on your way to developing the necessary skills to effective supervision, so let's get started with the one at the top of the list…practicing leadership. There's a difference between being a leader and being a manager.

A quote for you to consider about this subject….

"If there's anything I've learned in my 27 years in the service industry, it is this: 99 percent of all employees want to do a good job. How they perform is simply a reflection of the one for whom they work."

President of Hyatt Hotels

Well, we warned you that we might say some things that you'll not just mildly, but vehemently disagree with, and if the above quote, for you, just might be one of those things, we want you to consider something. Are you of the opinion that "you can't find good help anymore", or "these kids today don't want to work, they're just interested in how much money they're being paid"? Or do you work in an environment where the culture of the organization is such that it fosters support of such a philosophy? If so, we invite you to consider this:

What you expect is exactly what you're going to get.

And, no, we're not talking about some space-cadet, new-age, touchy-feely, unrealistic, pop-psychology crap idea here. We're talking about an honest-to-goodness, down-to-earth, matter-of-fact, realistic approach to understanding how the world works. It's a fact. What you expect is exactly what you're going to get. And the reason it's a fact is due to something called your Reticular Activating System….let's call it your RAS.

What's a RAS? It's a system that works within the human brain to help us function by filtering out what is unimportant to us and allowing us to concentrate on things that are important to our success in accomplishing anything we set out to do. The key to understanding this segment of our brain is in the first word that describes it…Reticular. A Latin term, it translates simply to meaning "Net-Like".

A net is designed to catch things. It also has openings that allow things that are not meant to be caught in the net to go on through. That's how your Reticular Activating System works. It acts like a 'thought-net' to catch the things that are important to you, while at the same time, allowing the things that are not important to you to pass by, for all intents and purposes, unnoticed. What this means from the 'you-get-what-you-expect' perspective is that you will, in fact, only be able to "see" the things that are important to you. And, like we said, this is a natural phenomenon that occurs in the human brain.

Consider this example: You're standing on one corner of one of the busiest intersections in the world, Times Square in New York City. You've decided that your objective (what is important to you) is to get across the street. So, what you're focused on is the Walk/Don't Walk signal. There is a huge amount of activity going on all around you…noise, motion, lights, giant text crawling across a huge screen reporting the news at the moment, etc…but you aren't paying attention. You don't really "see" all that going on. You're focused on, concentrating on, and giving all your attention to, getting across the street. Your RAS is working overtime to make sure you're focused on what's important at the moment, while at the same time filtering out what isn't important to you.

Well, in the same way that you're not really going to notice all the things around you that are going on if you're focused on nothing but the task of getting across the street, you'll also miss out on an opportunity to recognize someone that can be "good help" or a "kid who actually wants to work" if you're stuck on nothing but the factors of not being able to find good help or that it's impossible to find someone under the age of 30 who wants to work. Your RAS simply does its job of allowing the things that are important to you (meaning, in this case, what you actually believe and *want and need to be right about*…another human condition we'll talk about later) to get caught in your thought net, while at the same time allowing the things that are not important to you go by without your noticing them.

Not quite convinced that what we're talking about here is real? Want another example of how your RAS works?

O.K. …. do this: Go buy a new car. Then, notice as you're driving it around town for the first time just how many cars you'll "suddenly see" that are the same year, make, model and color of your car. Odds are, those cars were always around you, but you didn't notice them, not until you decided they were important to you because you just spent some of your hard-earned money for one just like them. So, one of the primary elements of developing leadership skills is to be open to ideas such as *it's not as bad as some might believe when it comes to things like finding good help*, as well as the other things you need to be able to do better than the average person can do them in order to be able to supervise effectively.

This concept of not being able to "see" things doesn't mean you're an ineffective service manager. It happens to all of us. And when it does, it's called a "scotoma". What's a scotoma? It's a Greek term that, simply translated, means "blind spot". And, until we recognize that we have a scotoma about something, we aren't thinking about doing something about it. Having a scotoma about anything is all about our environment and our past exposure to information.

For example, take a look at the illustration on the next page.

What do you see here?

Well, depending on your experience and environment, you may see a drawing of a pretty young lady, dressed stylishly in a fur and a head scarf with a feather, wearing a fashionable choker around her neck, and looking away from you over her right shoulder.

Or, you may see an older lady with a large nose, looking somewhat stern, with her chin down close to her neck. She's also wearing a fur and a feather, but she looks dramatically different than the young lady image.

(If you're having difficulty seeing both of them, here are a couple of hints: The older lady's mouth-line becomes the younger lady's choker, and the younger lady's cheek-bone becomes lower segment of the older lady's nose outline.)

The point is that whether you saw the young lady or the older lady first didn't mean you were "right" or "wrong" about the drawing…. Just that you were seeing it in a certain way due to your RAS doing it's job of "remembering" what was important to you an what wasn't, then allowing you to "see" a particular image. You had a scotoma about one or the other. That is, until we provided you with simple information that allowed you to set your scotoma aside and be able to see both images by shifting your perspective of the drawing.

By the way, have you considered the idea that the term 'supervision' itself simply means that you have to learn to develop super-*vision*?

We're not talking about the kind of super-vision of a comic book, T.V. and movie character in a red and blue suit with a cape, but simply the ability to develop the skill of having an above-average ability to see the big picture. When you develop that skill, you begin to learn the difference between supervising and managing tasks, systems and people as opposed to practicing leadership while supervising and managing.

John W. Gardner, former Secretary of the U.S. Department of Health, Education and Welfare directed a leadership study project in Washington D.C. and identified five characteristics that defined the differences between "run of the mill" supervisors and supervisors who not only manage, but also *lead* their teams.

1. Long-term thinking beyond the day-to-day tasks that need to be handled.

2. Interest in all other departments within their organization, understanding how all departments affect one another in the function of the entire organization.

3. Operating according to a strict code of values, maintaining a long-term vision and motivating others positively.

4. Always being willing to work cooperatively with other supervisors and departments.

5. Not accepting the status quo.

What goes along with these five factors is the simple fact that people don't really respond well to just being managed or supervised, they prefer to work for (actually *with*) a leader. And being a leader means that you have to always, always, always be the one who is willing to accept responsibility. Not just the responsibility for things when they go wrong, but responsibility for the entire operation over, within, and related to your super-*vision*.

Taking responsibility can begin with the three memos…. three memos that take tremendous courage to write, and can be effective whether you're taking over at the moment, or you've decided that it's time to start over in your supervisory capacity.

The following pages will provide you with a format for these three memos. You can print them out as they are, then hand-write the necessary information into the blank areas if you're of the opinion that that's an effective method of communication, or you can adapt their format into a document that you'll compose and print.

MEMORANDUM

DATE:

TO:

FROM:

SUBJECT: What I Stand For

SIGNED: ____

MEMORANDUM

DATE:

TO:

FROM:

SUBJECT: What I Won't Stand For

SIGNED: ____

MEMORANDUM

DATE:

TO:

FROM:

SUBJECT: What I Expect From You

SIGNED: ____

Well, what do you think? What kind of reaction do you think you might get from the people who report to you if you were to write and distribute these three memos with their subjects as we've listed them? Indignation? Anger? Threats of quitting? Maybe fear? Or maybe just surprise? It's often easy to think that writing and delivering these three memos in the format we've suggested can seem as though you're going overboard, ruling by intimidation, or whatever other negative label might seem to apply, but, consider this question:

How's your self-esteem? …..We're betting that if you are reading this, it's pretty high.

But, if you've been out in the working world for any length of time, it's a safe bet that you've dealt with somebody in a supervisory capacity with low self-esteem. Honestly, we really mean it. People with low self-esteem can get to be supervisors. It can happen because one of the hallmarks of a person with low self-esteem is the intense need to be recognized.

Imagine for a moment that you're a general manager and you need to appoint a supervisor, which means you need to assess all those under your direction and then decide which one of those people might be able to function in a supervisory capacity. If it happens that the one person who keeps coming to mind is someone who has managed to find a way to make sure that you've recognized their accomplishments, then, in the interest of expediency, it can follow that they'll be chosen for promotion to a position of management.

When that happens, the end result is a supervisor with low self-esteem, a dangerous combination. Dangerous because when a person with low self-esteem is in a position of management, they live in constant fear of two things….looking bad, and losing the job that they likely don't believe they're qualified to do. And when they're in that mode of thinking, they often act like a tyrant, ruling by fear and intimidation, not being open to suggestions of others in their department, and host of other negative behaviors such as not hiring somebody who is exceptionally talented because they're afraid that, in time, that person might wind up with *their* job. Think about it. In your experience, have you ever worked for somebody that you didn't have much respect for because of the way they behaved as a supervisor? Was that behavior along the lines of what we've described?

On the other hand, have you ever worked for somebody that you thought did a good job of supervision? Did you feel as though you were always treated with respect by this person? Did you have confidence in their ability to lead you and the others in their department? Did you have the opinion that if it ever came down to it, this person would, without a doubt, be in your corner and use their influence and position to protect you if it was necessary and the right thing to do? The fundamental difference between a fear-based management style and a confident approach to leading is the level of a person's self-esteem.

There's a story from World War I about a private, and General John "Blackjack" Pershing. The private was assigned to sentry duty one night during a mandated blackout. His responsibility was to make sure that nobody violated the order, and at one point in the dark of the night, he saw what looked like somebody nearby lighting a cigarette. "Put out that match!" he growled at the unidentified perpetrator in the darkness. A moment after he gave the order that he thought of as part of his responsibility, though, he was mortified to see that General Pershing had stepped close enough to be recognized.

The private tried to stammer his apology when Pershing interrupted him in a matter-of-fact tone, "That's OK Private. Just be happy that I'm not a Lieutenant."

Writing and distributing the three memos will only interpreted negatively by those who receive them if the person delivering them is thought to be a fear-based manager. If the person delivering them is known to be confident in their ability to manage, willing to accept constructive criticism, open to suggestions from others, and is known as someone who will always go to bat for their people, the closest the reaction will be to a negative will be what could be best described as a wake-up call.

When you develop your three memos, be concise. If you stand for the idea that customers deserve the best effort of everyone in the department, then go ahead and list that belief in your "What I Stand For" memo. This memo is a place where you can let people know what your values are. Values are based on our beliefs and if we believe that it's wrong to steal or cheat others, then that becomes one of our values. At first blush you may think it a bit cheesy to list things like your belief in being honest, not cheating customers, having a good work ethic and making every effort to show up on time for work, and being willing to do an honest day's work for an honest day's pay, but it's not. It works. Listing the things you believe in gives the people who report to you something to respect you for. It also, as you may be surprised to discover, gives them an opportunity to disagree with you and own up to it.

A hotel manager who listed the idea that "…guests deserve the right to leave money and other valuables in their rooms without being ripped off" in his What I Stand For memo was shocked to discover that some people on the staff admitted that they couldn't agree with that principle, that they would be too tempted to steal if the opportunity presented itself. You might not be shocked like that when you distribute your memo (be prepared, though….if there's one thing we've learned about people is that *anything* can happen) but you may still gain valuable feedback that will help you be as effective as possible as a supervisor *and* a leader.

In your What I Won't Stand For memo, list the things that you honestly believe shouldn't be happening in your department or company, even if it's more of a personal issue than anything else. If you honestly believe that "typical business atmosphere" cartoons, such as the ones that show some frowning or exasperated character with the caption "You don't have to be crazy to work here, but it helps!" shouldn't be allowed because they contribute to negativity in the workplace, then list that as an item that you won't stand for.

Sure, everybody may not totally agree with you when you list things that are essentially your personal preference or part of your beliefs, but that doesn't mean they won't respect you. People in general don't agree on everything all the time. They have differences in opinion when it comes to politics, religion, or a laundry list of other things, but that doesn't mean that they can't respect each other's opinions. It makes sense that some one who reports to you may not exactly agree with everything you say and do, but that doesn't have to mean that they can't stand to work with you.

In your What I Expect From You memo, you might decide that you should list some things that you yourself take for granted, but have discovered that others need reminding about, such as showing up regularly on Mondays, no matter how wild their weekend was. Or, you could lean more on your fundamental philosophies on dealing with customers, or it can outline specific procedures you want followed in a specific situation. The bottom line is that these are your memos. Put them together any way you choose, and remember that in the event that you have to issue a second or revised version of any or all of them, you can. That doesn't mean you should rush through creating them, though.

Another thought to consider is that whenever possible, it can be a good idea to do a first draft and then share them with someone before you go ahead with their distribution. Have them review them and give you feedback… but be aware of a possible pitfall in sharing the information. We said earlier that it takes a good deal of courage to develop these three memos, which means that if you're asking someone to review them, the feedback you get from them (if it's negative) might be based on the fact that they themselves would never have the courage to take such a risk, or that they may be intimidated by you. If you're going to ask for an opinion or suggestions, be sure it's someone you can trust.

Composing and distributing your three memos makes it clear to everyone you work with that you are serious about taking on the responsibility of seeing that your organization will function as efficiently as possible. To be an effective leader, it's necessary that people understand your acceptance of this responsibility. One way to think of the necessity that you not only take, but make it clear that you are willing to accept responsibility for leadership, is that you, your team, and the people who report to you, are like a wheel.

You are the hub.
Your people are the rim.
Your skills are the spokes.
A weak or missing spoke will cause a wheel to self-destruct.

And your job is to prevent that self-destruction and make sure that things get done, which means that in order to be an effective leader, you have to take an assertive approach to leading your team. Your three memos, when done properly, will show that you are assertive, not aggressive.

Being assertive means:

1. Not being aggressive.
2. Not being passive.

To understand the idea of assertiveness skills, we'll again consider the idea of driving a car, this time along an interstate highway. To effectively navigate the interstate at, say, 75 miles per hour, you might start out in the right lane, but soon, due to changing factors, you'll have to gently guide your vehicle into the left lane, then back again to the right. You'll also need to alternate between slowing down and accelerating safely. You aren't simply whipping the wheel from left to right (unless a serious problem suddenly presents itself) or slamming on the brakes and then jamming on the gas pedal. You're handling the operation of your vehicle with skill and finesse, confident that you'll be able to get where you need to go without incident, and also confident that if something serious does occur, you'll be able to deal with it. To effectively navigate the assertiveness Interstate, you have to do three things:

#1. Commit to excellence.
#2. Know the people on your team.
#3. Use your skills to hire, develop, lead, and guide the people on your team.

We'll wind up this segment with details on #1 from the above list. You may decide to share your commitment with others, or you may decide to keep it private, a tool for your own personal motivation. Whatever you decide to do in regard to sharing or not sharing your personal commitment to excellence doesn't matter. What matters is that you commit to excellence and that you write it down. A model of excellence commitment is on the next page. You can use print this page and use it exactly as it is, or you may decide to modify it. (And, yes, like the three memos, it takes a great deal of courage to decide on your commitment to excellence as a service manager.)

<u>A Service Manager's Commitment To Excellence</u>
<u>What I Want My People To Understand About Me</u>

I will move heaven and earth if necessary in order to help the people on my team do what they need to do and get it done when it's supposed to be done.

I will consistently work to allow each and every person on my team to learn, grow and develop as a professional so they will be enriched in their professional and personal life.

I will always have one person in training to replace me.

I will require commitments from everyone on my team and, no matter how hard it is for me to do so, hold them accountable to those commitments.

I will be willing to take responsibility and make the tough decisions, no matter what the circumstances; no matter who is involved.

I will regularly ask four questions of everyone on my team….

"How can I make your job easier?

"How can I help you do a better job?"

"How am I doing at being your supervisor?"

"What do I do that gets in your way?"

I will employ the U.S. Navy Now Hear This! philosophy and tell everyone on my team….

"You don't work for me. I work for you. It is your job to get things done. It is my job to make sure you have everything you need to do your job well."

Jim's Notes On Segment One…..

Whenever I consider the topics we discussed in this segment, there is an underlying idea that comes to mind:

Attitude.

After all, attitude is the bottom line for any business, and the attitude of those who provide front-line customer service…. employees who answer the phone or perform the services and deliver the products people are buying….has to be a number-one priority. Without a good employee attitude, all the advertising, marketing, tools, supplies, vehicles, etc…in the world are efforts wasted. And, of course, discussions about attitude with service managers, service company owners or supervisors often centers on their frustration surrounding the subject. I hear things like "I'm not supposed to have to try and change people's *attitudes* about their work. That's something they're supposed to just naturally bring to the job for cryin' out loud."

Well, in a perfect world, that might be true. But in a culture in which things are in a constant state of change, affected by advances (whether we want to consider them real advances or not) in technology and the natural tendency of things to change from one generation to the next, which means that it just isn't a perfect world, it's not true. It's a fact of life that it's now part of the job of being a leader to guide those in our departments and businesses who have direct contact with the customer about the best way they can do their job. It's not an easy thing to accomplish, much less accept as a reality, but we just have to as is sometimes said about dealing with unpleasant things, or things we're just not going to change… 'Build a bridge and get over it'.

And part of building that bridge is considering that a person's attitude about their job is related to their aptitude. No, I'm not just playing with words here. I really mean that we have to think about the differences in customer service *aptitude* when it comes to leading our people. Here's an example…

Our son Jess works for a major player in the hospitality industry, and one of his tasks in management within a five-star resort that has both a hotel and condos on the property is to consider the cultural differences between his customers and the staff who takes care of them. His customers often fly first class. The people on his staff likely don't. His customers drive cars that are different from the cars driven by the people who valet park them. It's Mercedes, Cadillac, Hummer, BMW, Lexus, etc…vs. Toyota, Nissan, Hyundai, and certain Fords and Chevrolets. His challenge is to find a way to provide the level of customer service that people who fly first class expect, and have that level of service provided by a group of people who have not had the experience of being on the receiving end of first class service.

Recently, we spent a week at one of the condos, and for a couple of nights, Jess was at the resort….as a guest…. checking in, ordering lunch by the pool, having dinner at one of the restaurants on the property, and having drinks with us at one of the patio bars that overlooks the lights of the city. Some of the staff obviously recognized him, but some didn't, which gave him an opportunity to observe how customer service was being delivered to the resort guests. One of the things he mentioned during our visit was how he expects a person to respond when they serve a customer, and the customer thanks them. (And, no, it's not with a "You're welcome" which most people would consider to be a polite reply.)

After our visit with Jess at the hotel and going back to our condo, I needed some ice and called the front desk because I didn't notice an ice machine nearby. When the person who answered the phone said that she would have some delivered to us right away, I thanked her for taking care of the situation. "Oh, it's my pleasure," she responded with a sincere cheerfulness in her voice.

Mission accomplished.

I'm not in the hospitality business and I don't know the specifics of making a hotel work, but I know how it made me feel when the response I got to my "thank you" wasn't a "you're welcome"…I was impressed with her attitude about taking care of me, and my request. And the underlying reason for her attitude was her aptitude. And her aptitude was the result of the training she received from her employer, who made it clear during a training session that the proper response to a guest offering thanks for being served was to let them know that thanks was not necessary because, after all, it was her job to handle requests from guests. As a service manager, have you considered that it's not just an employees attitude that should be considered, but their aptitude about what should happen in a communication between a customer and the person delivering the service or the product?

And, speaking of communication, if you're a mature person in a service management position, have you considered how technology has affected a younger person's understanding of communicating with others? In the last decade alone, purchasing and paying bills on-line, e-mails, and text messaging rather than talking with another person on a cell phone has resulted in a reducing the communication capability of those (younger people) who have become so comfortable with the electronic and digital world that surrounds us…and is growing every day. The challenge that presents for those more mature individuals who supervise others is that this factor has to be considered in employee training programs. Rather than shaking our heads of what the world is coming to and feeling like just throwing our hands in the air, what we need to do is as was said in this segment….build a bridge and get over it.

And, consider this about attitude and generational issues: The quote below is from an essay…

"I know a man of really brilliant parts who has not the ability to manage a business of his own, and yet who is absolutely worthless to any one else because he carries with him constantly the insane suspicion that his employer is oppressing, or intending to oppress him. He cannot give orders; he will not receive them."

For anyone who is of the opinion that the younger generation of today is going to hell in a hand basket, here's some information about the man who wrote the essay in which the above appeared. His name was Elbert Hubbard, and although he had only a grade school education, he wrote 182 biographies about successful people under the series title Little Journeys. He was born in 1859, and died on the cruise ship Lusitania when it was struck by a German torpedo and sunk in 1915. The essay was entitled "A Message To Garcia" and it was about a lieutenant who volunteered to deliver a message to a general who was "somewhere in Cuba" when war broke out in the 1880's between the United States and Spain. Nobody knew where the general was, but it was imperative that he be notified of the development of war. Hubbard's main point of the essay was that the lieutenant didn't question what was to be done or how he was going to be able to do it (and, no, the fact that he was in the military didn't have anything to do with his attitude toward getting something done)…he just simply accomplished what was a daring (and seemingly impossible) mission, and that the task of a supervisor was to hire and train individuals that would have the same approach to doing their job in a business environment.

My point in mentioning it here is that "a bad attitude" isn't something reserved for the current generation when it comes to a work environment. Hubbard wrote about it during an era when horse-drawn carriages were still common, so dealing with this issue isn't anything new.

As much as some supervisors would rather not mention it, there's this fact that cannot be denied…..stuff runs downhill. If a supervisor honestly has the courage to consider the attitude of someone who reports to them, all they have to do is look closely at their face. The attitude of their supervisor is written all over it. And, no, I'm not going to allow for any that cop-out shtick about not being the ultimate authority at the top, etc….

<u>**FACT:** Middle managers don't need permission from above to make their people feel good about their jobs.</u>

People are people, and if they are of the opinion that somebody cares about them and is willing to make an honest effort at helping them do their job as well as possible, they'll respond in kind, and do whatever they can to support that somebody, whether there's someone from 'above' who's not too well-liked or not.

"You may own the business, but you just rent the people."
Jack Welch

Another important point I want to make about the Garcia essay is the segment of the quote that describes the person as someone who "….carries with constantly the insane suspicion that his employer is oppressing, or intending to oppress him." There may be many reasons why someone may feel the way Hubbard describes the employee with the bad attitude, one of them being simply that they don’t trust their employer or possibly even the person who serves in the capacity of their direct supervisor. And, one factor that should be considered relative to this lack of trust on the part of the employee is that there is no rapport between him or her and the employer or supervisor. In the next segment, we’ll explore the underpinnings of establishing trust, which is gaining rapport with others. And gaining rapport with others begins with understanding them and learning how to communicate with them. Two subjects we’ll discuss in Segment Two.

“You teach what you know, but you reproduce what you are.”
Mark Sanborn

SEGMENT TWO: KNOWING THE PEOPLE ON YOUR TEAM

A scientist and his wife are out for a drive in the country. Noticing a herd of sheep, the wife says, “Oh, look! Those sheep have all been shorn.”

“Yes they have,” replied the scientist, “on this side.”

We’ll begin this segment by addressing one of the major challenges a supervisor faces in managing their organization and leading their people: Fear of having to replace someone.

It’s natural for a supervisor or service manager to want to avoid the hassle of finding a replacement for an employee who resigns or is terminated, but it’s one of the hardest, yet greatest lessons to be learned as the person whose responsibility it is to direct the operation and make sure the mission gets accomplished….that “putting up” with somebody who is somewhat (and consistently) difficult, confrontational, negative, or whatever label you want to place on them and their behavior in the workplace, is far more work than either making the decision for them, or engineering their decision to seek success elsewhere, and then go through the task of finding and hiring their replacement.

We said in Segment One that writing the three memos and making a commitment to excellence takes great courage. The reason they take great courage is that doing so can sometimes mean that someone will decide to resign because of your renewed approach to management, or you may decide that in order for you to hold true to your commitment and procedures for effective leadership, someone needs to move on.

Sure, it’s difficult, but if it has to happen, it has to happen. Not just for you, but for the well-being of your organization and the others in it. The Pacific Institute, a Seattle-based organization with decades of experience in providing professional development and management programs to Fortune 500 companies worldwide, determined the following in their studies of organizations: In order to offset the effect of one negative person in the workplace, there has to be eleven people who focus on the positive aspects of their job.

This is an important finding to consider whether your company is small or large. If you have less than ten employees, it means that your entire organization can be affected by one negative influence. If you have company that employs a hundred people, it will take only ten negative people to affect your entire operation. Either way, it creates a difficult environment for everybody.

An effective leader recognizes this challenge and decides to do something about it. That something might ultimately wind up to be a separation between that negative influence and the organization, but only after it's been determined that that's what is necessary. Before taking that step, the different ways in which different personalities can fit within an organization and work together as a unit need to be considered. And the first step in that process is identifying and understanding these different personalities.

"Take my building, equipment, all my money, my land, but leave me my people, and in one year I will be on top again."
Andrew Carnegie

There are likely dozens of ways to identify different people and their different personalities. One way is to consider four different categories relative to a person's behavior and how they function in their work environment.

1. The Director

The Director personality wants their marching orders and they want them clear and concise. When you're telling a Director what you want them to do, put it in writing and do it in bullet points (no more than four at a time), then get out of their way.

Directors are often people of few words, speaking directly, somewhat fast-paced and high-volume. Director supervisors are task-oriented and often their common approach to things is "Just get it done". You know you're dealing with a Director supervisor when there are no guest chairs in their neat, orderly, organized office with maybe one or two pictures of their family that you can only see if you're seated at *their* desk.

2. The Socializer

The Socializer's philosophy is "never waste a crowd" and if their job takes them away from others or puts them into a cubicle, they see it as solitary confinement rather than just a workspace. Socializers love to talk. When communicating in writing with a Socializer, do it in paragraphs and keep using their name. In a Socializer's environment, whether it's an office or their service vehicle, you'll often see pictures, and they'll be in most of them.

3. The Thinker

The Thinker often communicates verbally with a slow, quiet speech pattern and their office or work area is often "organized" via piles of things everywhere, but they know where to find anything they need. A memo to a Thinker can contain an endless list of bullet points and they'll take it in stride. A Thinker is more about perfection that hitting a deadline.

4. The Relator

Relators are peacemakers and caregivers, and they're most likely to have a bowl of candy on their desk…not for themselves but for anybody who happens to come by to talk. A Relator will likely have live plants in their office, not artificial ones. Communicating with a Relator in writing is best accomplished in paragraphs, and you don't have to keep using their name.

There are two keys to working successfully with Director's Socializers, Thinkers and Relators as a supervisor:

1. First of all, recognize these different personalities and understand that properly assigning tasks, delegating and supervising these different people can result in the highest possible efficiency of your organization.
2. Understand that you're not going to be a match for every one of these personalities….by the way, have you given some thought to where *you* fit in when considering these personality descriptions?.... and, when necessary, be willing to adjust your communication methods when working with them. Develop a strategy to give people what they need so you can get what you need. Remember…. "People like people who are like themselves."

By the way, what do you think can happen when two different behaviors relative to these different personalities are occurring in any kind of a relationship, whether it's personal or business?

Here's a simple one…..Consider a Socializer wife who says "Let's go to the movies" (any movie, as long as it's to the movies. Remember, to a Socializer, it's important just to be "out there" with other people) to her Thinker husband who is willing to go as long as he can:

1. Do research to find out which movie is the best to see at the moment.
2. Check to make sure it's not sold out,
3. Check to see if the tickets can be purchased on-line in order to save time.
4. Consider whether or not parking is a factor in the cost.

…..all of which leads the Socializer wife to think:

"Oh! Forget it already! All I wanted to do was go to a move!"

Exasperation… Have you experienced that as a service manager or employer, or in a non-supervisory position when dealing with co-workers?

Maybe you're just matter-of-factly shrugging your shoulders in a "yeah" response to that question, or you're just nodding your head, or maybe you're recalling not just exasperating moments, but Mega-Exasperating experiences you've had when dealing with different people. Whatever your level of response is here isn't the most important thing to consider. What's important is the fact that, more than likely, it's a "yes."

There are several different approaches to understanding different personalities and how they fit into the work environment. In Appendix A, you'll find a group of personality tests you can administer to your current staff or to prospective hires to get an idea of where people are coming from in their perspective on their life and work.

So, what can you do to cut down (yeah, you could eliminate them altogether in a perfect world, but…..) on those exasperating moments? We've already given you a broad hint. In each of the explanations we offered on the different types of personalities, we mentioned the idea of how to communicate effectively in writing with them. Whether it's with a brief bullet-point memo with lots of white space for the Director, or a one in a paragraph form for the Relator, disseminating information in writing is something an effective service manager does consistently. If you're of the opinion that you're not very good at the written word, find a way to get better at it. Take a community college Writing 101 class, sign up for a seminar on effective written communication that's offered by various private companies (Fred Pryor Seminars, SkillPath or Career Track) that regularly schedules various business-topic one or two-day workshops at local hotels in your area, or get a book on the subject of how to write well. But do it. Writing memos on a regular basis may seem to be more work that it's worth or may even be painful for you at first, but you'll get to a point where it will become a natural way for you to communicate. And when you reach that point, you'll forget about most of the effort that it took to get you there.

"We are what we repeatedly do. Excellence, then, is not an act, but a habit."

Aristotle

In addition to communicating in writing, there's the perspective of one-to-one personal communication. Of course, just understanding the differences in personalities is a good start. As a follow up to that, take the simple approach of listing the names of your people (remember, they are "your" people and your job is the lead them!) and think about their possible category of personality. If you can't totally nail down one of the four personalities to list next to their name, make a point to observe them carefully. You'll likely see some indicators that you may have missed in the past. Keep in mind also, that a person may be more complex, and listing them as being just one personality may not be possible. Even if there is some variety in their approach to doing their job, though, you can often consider one of their personality traits as the dominant one and focus on that.

Another aspect of personal communication is focused on a science known as Neuro Linguistic Programming, NLP for short. Here's a simple way to consider the NLP system:

Neuro = Brain
Linguistic = Language
Programming = Information Processing System

….Meaning simply that everyone’s brain employs a certain language for processing information, and, by the way, in the same way that we are all different personalities, we’re not all the same when it comes to NLP.

The idea behind NLP was born when two university professors (Richard Bandler and David Grinder), one a linguistics expert and the other from a mathematics background, wondered about something. That something was why some students seem to “connect” with a particular instructor in an academic situation, and in turn, do well in their studies, while other students don’t seem to connect and do well. They reasoned (quite correctly) that the problem couldn’t just lie with the students. After all, there were situations in which students didn’t do well with one professor, did quite well with another, so that meant that they had both the ability and the motivation to learn. But, what was the underlying reason behind this phenomenon, they wondered.

Well, their wondering and considering and testing and measuring and observing led to this conclusion: People, whether they are in a student/professor or other type of environment, have specific ways of communicating, and sometimes that communication isn’t good match, which results in problems in the conveyance of information. Not exactly rocket science, obviously, but it did lead to a system in which different people’s communication methods could be categorized. What Bandler and Grinder came up with was the idea that when it comes to verbal communication, people can fit into three basic categories.

About 65% of the population, they were able to confirm, are visually oriented in their learning and communication methods. A visually dominant person understands best when they can see what they need to learn or do. They also use certain key words when communicating. For example, if you were to ask a visually dominate person the generic question “Do you understand?” their response will likely be something along the line of “I see what you mean”.

Subsequent studies over the years have shown that people who have a tendency toward art or photography are visually oriented in their approach to communication. Also many academic teachers, it turns out, are visual people. And, of course, this is means that since the majority of the population is a “match” with most of the elementary and secondary teachers in our public school system, a fair percentage of people get passing grades as they go through the system.

The second group, which makes up about 15% of the population, is referred to as being dominantly auditory. That means that this group of people learn and understand best when they can listen well. If you were to ask a dominantly auditory the “Do you understand” generic question, they response would likely be something like “I hear you.” Auditory people are often found in professions where voice and tone are a part of their job, such as music or in radio and T.V. work.

And then there’s the third group that emerged from the development of the science of NLP. They’re referred to as kinesthetic, which means that they learn and understand best when they can get their hands on things. If you’ve been doing the simple math here, you’ve figured out that this group makes up 20% of the population. As a service manager, you’ve also probably figured out that this is the group of people tend to become technicians, mechanics, machinists or welders, or go into other “hands-on” professions. The typical response to the “Do you understand?” question for this group….”Yeah, I’ve got a handle on it” or something on that order.

What these categories mean to you as a supervisor or service manager is an opportunity to further understand and communicate effectively with the people who report to you. No matter what your tendency may be, if you understand that there are differences that can lead to a mismatch in communication, and therefore difficulties in relationships, you can listen carefully to others, and, if necessary, adjust. Does the person you’re communicating with use a lot of “sight” words? If they do, they’re likely leaning on the visual approach as their dominant information processing system. If they use a lot of “sound” words or phrases they’re auditory. Or, if they tend to use “feeling” terms or phrases in their speech, then they are likely dominantly kinesthetic.

In most cases, we all tend to be dominant in one of the three major categories of verbal communication while using the other two as a kind of support system to make sure we understand things. The following is a conversation between two people in which there is a mismatch in their communication, and things are not going well.

(The dialogue of one person is shown in bold print, and the other is shown in italics.)

“You need to be able to see the results in advance.”

“I think I’ve got a feel for it.”

“But that’s not enough. You really have to picture how it will happen.”

“Oh, I know. You mean like putting your toe in the water before you jump in.”

“Well, no, I mean extending your field of vision to include all the possibilities.”

“Sure, you mean getting a firm grip on the potential problems and tackling them before they block your path.”

“Well, no, not exactly. You just need to focus on those trouble spots in order to have a good perspective on the potential problems.”

“That’s what I said. Taking care of those stumbling blocks so they won’t hit you from behind.”

“What’s wrong with you? Why can’t see what I’m saying?”

“What do you mean? I think I’ve got the problem well in hand.”

Likely, it didn't take you long to figure out that our example here was of one person who is dominantly visual and another who is dominantly kinesthetic, and although, they were saying expressing the same idea, their "language" was preventing them from understanding each other. There was no rapport between them. The idea to focus on when it comes to employing NLP skills in your day-to-day function as a supervisor or service manger is this: In the same way that you can take a simple approach to observing people and their environments to determine if they are Director, Socializer, Relator, or Thinker types, you can listen closely to a person's speech to determine if they are dominant in the Visual, Auditory, or Kinesthetic area. A simple mismatch in communication can lead to serious complications. As an effective Supervisor/Service Manager, your task is to be the one who knows how to avoid a mismatch in communication that could lead to a serious problem. The more you work toward gaining rapport with the people on your team, the more harmonious your operation is going to be. And the more harmonious your operation is, the more you and your team will get done in a day.

One definition of "rapport"…. ***To offer back with grace and elegance.***

If you happen to, for example, be a person who is dominantly visual, and you're explaining a task or procedure to a person who is dominantly kinesthetic, you can adjust yourself and make sure you use "feeling" words rather than "sight" words to communicate as effectively as possible with them.

In Appendix A, you'll find a Visual/Auditory/Kinesthetic evaluation so you can, if you choose, get more information on a person's specific communication methods. Administering the evaluation, then using the answer key will let you determine a person's dominant communication system.

As we mentioned, studies of the science of NLP show that we generally use one of three surface information processing systems in a dominant manner, then use two others as support in order to make sense of information that comes our way…then we use other, more deeply-rooted methods, referred to as Meta Programs, to make sense of our entire world. The point is that a simple mismatch in communication can lead to complicated problems. As an effective Supervisor/Service Manager, your task is to be the one who knows how to avoid a mismatch in communication that could lead to a serious problem.

METAPROGRAMS…..

Another element of in the science of NLP is known as Metaprograms. “Meta” is a prefix that sometimes gets people to thinking we’re going to talk about “weird” stuff because it is often coupled with the word “physical” and, of course, “metaphysical” things, for some people in our culture, is, well, something they would just as soon avoid discussing. However, when we use the term “meta” relative to NLP we are pursuing its simple definition, meaning “beyond” or “over and above” the surface. The three areas a surface communication…visual, auditory and kinesthetic… are just that: On the surface when it comes to communication, but Metaprograms are deeper than that.

The simplest way to consider Metaprograms is to look at them as a psychological filtering system. Metaprograms filter what a person sees and experiences, and determines how they make sense of, and respond to, those experiences. As we review the different types of Metaprograms, you’ll likely think of some of them as simple and common sense when considering people’s behavior, while some of them may be a bit more complex. You may also be inclined to think that as we present the factors relative to Metaprograms, that some of the “people traits” we’re discussing could be construed as being negative, while others look to be more positive. Nope, that’s not the case at all. The traits within Metaprograms should never be labeled as negative or positive (bad or good), only different. Keep that in mind as we begin our in-depth look at this subject by discussing one of the most obvious types of Metaprograms, the one relative to the direction someone may take when dealing with any situation.

The Direction Metaprogram: From a simple perspective, people’s Direction Metaprogram causes them to do one of two things when dealing with their lives in both a professional and personal environment:

1. Follow their desire to gain pleasure.
2. Follow their desire to move away from pain.

Entire books have been written on this subject, so if you want to do more research on the pain/pleasure continuum and look deeper into what *motivates* people to go one direction or the other when it comes to this subject, there's plenty of information out there. You'll notice that we placed an emphasis on the idea of motivation here. That's because we want to present two points about that subject relative to understanding other's personalities and how they communicate.

The first point is that when it comes to the subject of motivation, what we need to understand is that as a supervisor, we can never really motivate someone else to do something we want them to do. We can only figure out how to encourage them to motivate themselves. The second point to understand is, because people (as we've been showing you in this segment), are all different, the things that motivate us as individuals won't necessarily motivate another person.

So, while *your* natural tendency to be more inclined to follow your desire to gain pleasure in your work environment (a trait commonly observed in many people who hold supervisory positions), may be what motivates you, it's not chiseled in stone that that's what will motivate someone you supervise. For example, you may feel as though you're banging your head up against a wall when you take the approach that "attending Wednesday's 6:30 AM Technical Update Session will help you in troubleshooting this latest generation of electronic control system" in your memo, and then find yourself faced with the fact that someone isn't excited about showing up for the training.

The reason that some people may not respond to your memo, which is composed from the perspective of gaining pleasure, is that what motivates them most is not gaining pleasure, but avoiding pain. If you discover that a person is one who is more motivated to avoid pain than to achieve pleasure, you could explain that attending the training session will "help you prevent the frustration" of troubleshooting the latest generation of electronic control systems. The point here is that in order to gain rapport with the people you lead you first have to understand that they are of various personalities, employ different types of communication methods, and make sense of their world in different ways. So, it's a good bet that you won't be an automatic exact match with everyone, which means that you'll often fine it necessary to adjust your behaviors and communication methods in order to achieve a match-up with others.

Often, it only takes the knowledge and understanding that people are different …..Socializers, Directors, Thinkers or Relators, that they communicate verbally from either a visual, auditory or kinesthetic perspective, and that their MetaPrograms vary….with some purposeful observation along with that knowledge and understanding.

"People like people who are like themselves."

The above quote is the underlying philosophy of suggesting that someone in a supervisory position should take the approach of observing, then adjusting their methods of communication to better match others. Your goal as a supervisor, as we mentioned previously, is to find a way to inspire others to motivate themselves, and when a trust has been established between supervisors and those who report to them, it's the first step toward gaining the necessary rapport that will help you achieve that goal.

Remember Elbert Hubbard's description of an ineffective employee in his Message To Garcia essay ("I know a man of really brilliant parts who has not the ability to manage a business of his own, and yet who is absolutely worthless to any one else because he carries with him constantly the insane suspicion that his employer is oppressing, or intending to oppress him. He cannot give orders; he will not receive them.") from Segment One? That, whether it's comfortable to admit or not, is what you may be up against as a service manager and supervisor. But it's not an insurmountable obstacle to building an effective work team. Making the effort to understand different personalities and what motivates (or doesn't) people is the basis for success in that effort.

The second MetaProgram to consider in the study of NLP and how people make sense of and react to their world is:

The Reasoning Metaprogram. Understanding this MetaProgram explains why people do the things they do and the way they do them, according to two thought patterns, which are described as necessity and possibility. One way to get a handle on this concept is to consider what kind of response you would get from somebody if you asked them the question, “What prompted you to get into this kind of work?”

If the response was something along the line of “There just weren’t a lot of other options available at the time,” that would indicate a necessity perspective. However, if the person’s description of winding up in a particular type of profession or a specific job was something like “I did some research on the different kinds of jobs there were out there, then decided which way I wanted to go,” that would indicate a person who comes from more of a possibility perspective.

By the way, remember the point we made when you begin your study and understanding of MetaPrograms. It’s easy to think of one perspective as being a positive approach (therefore being “good”) and another perspective as being a negative approach (meaning “bad”) but that’s not what we’re suggesting. The way we want you to consider MetaPrograms is from the perspective that there is neither “good” nor “bad” in any of the tendencies we’re presenting, just different approaches that different people take to their life and their work.

The third type of MetaProgram is known as:

The Relationship Metaprogram, which describes the way people make sense of things by either matching or mismatching new information or factors with things and ideas with which they are familiar. There are four categories to describe this MetaProgram.

1. Sameness Matchers.

2. Sameness With Exception.

3. Difference Persons.

4. Difference With Exception.

Sameness Matchers use the least complicated approach to understanding things. From their perspective, they simply make sense of anything that happens to them (or what they have to learn relative to a new skill or update in their skills) by matching it up in some way as being similar to something they already know and understand.

If you were explaining a new procedure to a Sameness Matcher, you would only have to think of what is similar between the new procedure and the previous process…..”It’s the same procedure as using the old form,” would be all you would have to say, and even if there were differences on the two forms, the Sameness Matcher would barely notice. They would simply proceed with the use of the new form.

When explaining the same concept to a Sameness With Exception person, however, your task would be to mention that “It’s the same procedure as the old form, except for the fact that you have to…..” whatever. With that explanation, the Sameness With Exception person’s thought pattern would be that they have no trouble taking instruction and direction from the person providing the information. Everything is “clear as a bell”….(especially if they are an auditory person).

A Difference Person takes a more complex approach to any subject, and begins their understanding of new information by searching for factors that are not the same, but different. They will often wind up agreeing with a Sameness Matcher who explains what is similar about something new, but only begrudgingly.

A Difference With Exception Person is the most complex, and can often be a challenge for those who take the sameness approach to understanding something new. In their case, they need to first discuss at length what is different between the new and old or two different situations, then have to point out that there is a particular thing or two that are, in fact similar.

Here’s one way to look at these four different types of people:

If you were to pull a handful of coins from your pocket and show them to a Sameness Matcher and ask for an explanation or evaluation of what you were showing them, there simple response would be something like “It’s all money.”

A Sameness With Exception Person, however, while they might have the same initial response, could only complete their explanation to you if they took the time to point out there were more dimes than quarters in your hand, or whatever circumstance would apply.

A Difference Person would have to take the time to describe each of the coins you were showing, along with making sure they explained how many of each you had in your hand.

A Difference With Exception Person would also take the time to go through the difference procedure, but couldn't just end on that note. They would have to come up with some explanation of something you could do with the coins since they were, after all, "all money."

The fourth MetaProgram type is known as:

The Frame Of Reference MetaProgram. This approach to communication and functioning in any type of situation shows how a person judges their own actions, and there are two points of view. These are described as an internal frame of reference or an external frame of reference. This MetaProgram is one that can easily be assumed to be of the negative/positive, bad/good approaches to work and life, but, as we said, there are only differences in people.

While it would be easy to assume that some with an internal frame of reference could be considered selfish, while someone with an external frame of reference could be considered generous, the Frame Of Reference MetaProgram doesn't describe people in that manner. We'll explain this one by first considering a particular profession, that of a lawyer.

A person with a strong external frame of reference would be more concerned with the effects of a decision on others, and thereby would be more limited in their effectiveness than a lawyer who had a strong internal frame of reference, with their main concern being making sure the decision went they way they personally thought it needed to go.

Another way to look at the Frame Of Reference MetaProgram is to consider a simple question you could ask, which is "How do you know when you've done a good job?" If the person's response to this question is "When somebody tells me," then they are of an external frame of reference, and they need assurance from the outside in order to feel OK about any situation in which they are involved. If their response, though, is in the vein of "I just know," then they are of an internal frame of reference, and don't need any input from others to be sure of how they feel about things.

From the perspective of a supervisor, it's important to understand the differences in approach involved with this MetaProgram. If some one is of an internal frame of reference, they can actually be uncomfortable with hearing from others that they've done a good job on something if it's presented, in their opinion, more often than necessary. If a supervisor is a person of an external frame of reference, for example, they would think it to be a natural and comfortable process to hear from others that they're doing well. But, if the person on the receiving end of the communication was of an internal frame of reference, and therefore not in need of any type of assurance from another, they may question the sincerity of the praise. On the flip side, a supervisor of an internal frame of reference may not feel the need to tell someone of an external frame of reference that they are doing well, leading that person to complain that the only time they hear anything from their supervisor is when they do something wrong.

One way to assess whether or not a person is of an external or internal frame of reference is to consider how they would fit into the Socializer/Relator/Director/Thinker personality system. A Socializer personality would more than likely be of an external frame of reference, as would a Relator. Those who fit into the category of Director and Thinker would be more inclined to have an internal frame of reference.

The fifth MetaProgram is known as an:

Attention MetaProgram, which shows how people let others know they are paying attention. There are two types, described as either sorting by others or sorting by self. Again, while it would seem natural to describe one of these as being positive and the other as negative, that's not the case. The way we want you to consider this MetaProgram is that if a person sorts by others, they would likely do well in a certain type of job, while a person who sorts by self wouldn't do as well in the same job. The best way for us to explain this concept is with a true story.

Several years ago, a major airline determined that 90% of their customer complaints were the result of contact with 10% of their employees. That being the case, they knew they had to take action, which they did by hiring a consultant to help them with the issue they were facing. The consultant's evaluation of the problem was to either terminate or re-assign the employees responsible for the complaints. When the management team heard this, they naturally thought they were wasting their money on the consultant, but there was more to his evaluation.

Taking the offending employees out of the equation was only the primary step to solving the situation. The consultant proposed a plan to put new people (whether they were being re-assigned from other positions within the company or hired new) into the front-line customer service positions that were the contact point of the complaints. The hiring/re-assignment process was implemented, with a twist. Each of the applicants was assigned a number and the "interviewing" was accomplished in groups of 20. The task of applicant number one and so-on was to explain to the other 19 applicants in the room why they thought they were a good fit for the position of customer service representative. And, the applicants were told that in addition to accomplishing a presentation to the other applicants, they would be taped via a camera positioned at the rear of the room, behind the applicants seated before them in the "audience"

But, there was another camera in the room…a secret one. It was positioned *behind* the person who was speaking at the moment. Since it was in that position, it obviously wasn't there to observe the person at the podium, but of the people in the audience. With this camera, it was determined if someone had the tendency to sort by others, or sort by self. If someone in the audience of 19 seemed interested in what the applicant at the podium at the moment had to say, it was clear they sorted by others.

If they were not paying attention, only waiting for their turn to get up and speak, then it was determined that they sorted by self. With the evaluations completed from this perspective, those who were deemed of the sort-by-others approach were selected for the front-line customer contact positions. The end result was a drastic reduction in complaints….and the underlying reason for the change was simply making sure that the right people were placed in the right positions. A person who sorts by self may do just fine in a position in which they don't have contact with customers directly, but not be effective if they're in a position that is wrong for their personality and their approach to relationships with others.

Jim’s Notes On Segment Two….

It’s been my experience that one of the most daunting challenges a technician making the transition to service manager (or service company owner) faces is the idea of getting over the feeling of needing to do what we often refer to as “honest labor.” But the material presented in this segment is, in fact, a supervisor’s “honest labor.” Figuring out where people are coming from in their approach to their work and their life overall is hard work… a different kind of hard work than learning how to troubleshoot and repair things, or assemble things, but still hard work. But that doesn’t mean that everything a supervisor needs to learn or be proficient at is totally foreign to them.

My first exposure to the science of NLP came about when a graduate student needed to observe a vocational education instructor in a classroom setting. After sitting in, he mentioned (and seemed impressed) that I was “using Neuro Linguistic Programming” in an effort to connect effectively with those who needed to understand the concepts being explained. I had no idea what Neuro Linguistic Programming was, but, as it turns out, I’m the type of communicator that naturally weaves around through the visual/auditory/kinesthetic methods of communication because I’m not necessarily dominant in one of them alone. I discovered that by answering a series of questions like the ones in the NLP evaluation you’ll find in Appendix A.

As you pursue your supervisory responsibilities, which, as you know is about 85% communication and only 15% technical, you can use an NLP evaluation to accomplish two things. First, take the test yourself without looking at the answer key. When you take this approach you’re in for an enlightening experience about yourself. You’ll know if you’re dominantly visual, auditory or kinesthetic. Most people are dominant in one of the communication methods, using the other two as a support system. Once you “know where you come from” relative to a communication system, it helps you to figure out how you need to adjust when communicating with others who are not a natural match with you. The NLP evaluation is something you can use for job applicants as well as for present employees. Of course, you’ll need to be careful when involving those on your staff, asking them to complete the evaluation. It will take some explaining on your part, or even perhaps conducting an in-house training session on customer service and including the NLP evaluation as part of the process. But you'll find that however you get it accomplished, your efforts will be worth it, not only for the benefit of a better understanding your own people, but for their understanding of others as well…not only fellow employees, but customers. And customers, since that's really what it's all about for any business, large or small, will be the focus of our next segment.

"You can always tell a man who thinks he's smarter than others, but you can't tell him much."

Napoleon Hill

SEGMENT THREE: A CULTURE OF CUSTOMER SERVICE

A grandmother sits on the beach, watching her grandson playing near the water. Suddenly, a towering wave breaks onto the shore, and then rushes back out, taking the boy out to sea. "Please God", the grandmother pleads, "save my grandson! Please bring him back!"

Just as suddenly as the first wave arrived, another huge wave crashes to shore, washing the boy back onto the beach, somewhat dazed, but good a new.

The grandmother looks up to the heavens and says, "He was wearing a hat!"

Sometimes, it can seem that some customers, no matter how hard you work to please them, will never be satisfied. But that doesn't change the fact that customer service is what it's all about for any business. And the task of service managers is make sure that all the people they lead never forget that, and that they maintain a culture of customer service every time they deal with a customer on the phone or in person.

"It is not your customer's job to remember you. It's yours to make sure they never forget."

Patricia Fripp

Read any mission statement for just about any business, large or small, and it's likely that somewhere within it there will be a reference to customer service. And that's OK, for a start. The real issue for any business is not just customer service, but customer loyalty. With customer loyalty, you get two things any business needs to grow and prosper:

1. Repeat Business
2. Referrals

There is a cab driver in Dallas, Texas that understands customer loyalty. When you get into the back seat for the first time, you're surprised because it's, well, just not what you expect in a cab based on past experiences. First of all, it's immaculate and there is no odor other than that of being clean. There's a small cooler and you're free to help yourself to complimentary juice, soda or water. And, if you haven't had a chance to catch up on the news in the Wall Street

Journal or USA Today, there are copies there for you to peruse….while you enjoy a light snack if you like.

If you confirm that you're not in a hurry on your way to your hotel from the airport, you might find yourself viewing one of the sights in the area, complete with a narration about it. (No, you won't care about a little extra time on the meter.) When you arrive at your destination, the driver hands you a business card and makes sure you know how much your business is appreciated, and that you can call in advance to arrange your next trip.

In the usual world of cabbies at an airport, they pull up and wait their turn to move forward so they can pick up a fare, but not this one. He's always booked and drives straight to a pick-up point to welcome his next fare. His customers get the best service he knows how to provide, and because of it, they're loyal to him. They think of him when they need to get to the airport or when their flight arrives, and, often, they just need to hit the speed dial on their cell phone to call him. It's a classic example of the philosophy that you don't have to be a large business to implement simple ideas that ultimately result in customer loyalty.

That's not to say that a large business can't do the same thing, though.

If you shop at Nordstrom's for clothes, you can take as many items as you want into the dressing room. Other department stores don't do that. They impose limits in the interest of "security" and the prevention of shoplifting. Well, the bottom line on shoplifters is that they make up just about 1% of a customer base, which means that 99% of those who want to try on more than three items at a time at a store other than Nordstrom's are either mildly irritated by the rules, or downright insulted that they're considered a possible thief who intends to steal something just because they showed up to shop there. Not exactly something that would promote customer loyalty. And not difficult to figure out how to correct it either…something as simple as just getting rid of rule that's prevalent throughout most of an industry.

So, a culture of customer service that leads to customer loyalty is simple, but that doesn't mean it's easy. It takes a commitment on the part of management, and it takes constant (yes…constant) attention in support of the commitment. In his book *Lip Service*, author Hal Becker says it best:

“Having customer service seminars only once a year for your people is like deodorant. It wears off after a while and the smell comes back again. Customer service training has to be their focus every day.”

A good approach to maintaining a customer service culture in any business, and it begins with figuring out how to implement a customer service policy in the first place. Here’s one way to get started:

At your next staff meeting, hand out 3 x 5 index cards. Explain that you want to present a simple, down-to-earth way to look at taking care of your customers by breaking the procedure for the process into two parts.

Have everyone write on one side of their index card the following: “Part One: Provide Outstanding Customer Service”. Then have them flip the card over and write: “Part Two: Use Your Own Best Judgment In Any Situation”.

What you have accomplished in less than two minutes is establish your “Policy Manual” relative to customer service. Of course, you likely have a company policy manual that outlines specific procedures that are to be followed when a specific situation comes up. Your Customer Service Policy Manual isn’t designed to replace your company policy manual, and it doesn’t list specific job descriptions and detailed procedures. Instead, it expresses a philosophy in a simple, workable mission statement.

To put your customer service policy to work, remember part one of the mission….”Provide Outstanding Customer Service.

In any situation in which a staff member is either on the phone with a customer, explaining in person to a customer what your service pricing structure is about, detailing the service that will be provided, providing the service the customer asked for, or following up with the service, Part One of the mission is the basis for every procedure.

If, in the process of accomplishing any of the things mentioned above a ‘what if’ comes up, then Part Two of the customer service policy manual is the procedure…..”Use Your Own Best Judgment In Any Situation….that applies.

What’s a ‘what if’?

That's how the first question you're going to be asked during the meeting is going to begin. Well, there might also be a 'but' in there somewhere, but the real essence of the question will be, 'What if the customer says…." or 'does' or 'wants', or whatever. What the person asking this question is looking for is something they're likely used to getting in their work experience: Specific instructions on what to do with a specific situation, according to "company policy." And that's OK. Remember, you're taking a step here that is quite uncommon in service management and you can expect that there will be some concern about the possibility of screwing things up.

Or, the person asking the question is someone who, when pressed to discuss the idea of customer service and the duties of individual staff members to accomplish customer service, is likely to lean on that #1, all-time bad attitude indicator statement, "That's not my job."

Of course, that's what they'll say to a service manager's face during the meeting. What they say to other employees after the meeting…when the 'real meeting' takes place in the break room or in the parking lot… is something on the order of "They don't pay me enough to do that."

Whatever the reason for asking the question, if it's wanting to do a good job, or whether it's the 'bad attitude' approach, you can deal with both of them with the same explanation because they're both coming from the same place….fear. That's right. They could be of whatever personality type or have whatever MetaProgram tendency we discussed in Segment Two, and you're going to be able to use the same explanation for both of them.

Here's a simple fact of life about customer service: <u>Less than 10% of the population knows what outstanding customer service is and how to deliver it on the day they are hired.</u>

That means that your job as a service manager is to train them on what it is, and how they can use both their natural skills, and the skills they will learn from you, to provide outstanding customer service. It all starts with you. From having the courage to put it down on paper in your "What I Stand For" memo to following up on a daily basis by taking the time effort to recognize a person who has met your expectations of doing their job as well as possible. And the key element within this process is to again have extreme courage as a leader by giving people the opportunity to do their job when it comes to customer service.

When you explain that Part Two of your customer service policy is “Use Your Own Best Judgment In Any Situation”, make it clear that you aren’t saying that an individual dealing with a customer in a particular situation is ‘out there all alone’ making every decision about the right thing to do when a “what if” comes up. (Up to a point, of course, they are. After all, in a business where customer service doesn’t just get lip service, but is the *culture* of the operation, a reasonable person is *bound* to know the right thing to do in most every situation.) What you are saying is that part of using good judgment may be to call you for advice and guidance if necessary, or it could be just confirming with you what they are either planning to do, or did do, about a given situation.

By the way, when you get to the point where your staff meetings or individual discussions are more “did do’s” than “planning to do’s” you know you’re achieving your commitment to excellence as a supervisor. (See Segment One, “A Supervisor’s Commitment To Excellence, What I Want My People To Understand About Me.)

Implementing a culture of customer service into your business, like the other stuff we’ve discussed so far, takes courage. And, in this situation, there’s another element to it. When you get your plan all together and you’re ready to present it to your people, it’s natural to have misgivings about it, even wonder if you’ve just wasted a lot of time in planning something that might not work, or might not be accepted. When those kinds of thoughts creep into your mind, think about a simple idea. Psychologists who study, evaluate, and work with people have come to a lot of conclusions about “the human condition”. The conclusion that is the most important one for supervisors is this: People are always happiest when they are striving toward achieving something.

Of course, there are a lot of something’s in people’s lives, both from a personal and professional perspective, and they could be labeled as ultimate goals or accomplishments….something that offers a great deal of satisfaction to the individual once they’re finished with a process. The idea of a culture of customer service (the bottom line of which is really customer <u>loyalty</u>) though, isn’t a goal or accomplishment that has an end to it. It's a process where your people will be happy to be part of it because they come to understand that it's a journey that never ends. And with that understanding, they begin to feel the personal satisfaction they get from knowing they are part of something big, enjoying smaller victories along the way as they take care of each customer by going above and beyond. Your job is to help them understand that they can be part of what is, unfortunately, often considered to be a fraction of the workforce that possesses both the attitude and the ability to regularly go above and beyond.

There are two methods you can employ to implement and maintain this above and beyond culture in your business. The first is to give them some examples of people who consistently go above and beyond. There are countless stories of customer service you can recount at your regular staff meetings or during a one-to-one interaction with one of your people.

Consider Pancho Thompson, a UPS driver in Cleveland, Ohio….He consistently makes his daily run in less than 8 hours, and has done so for over 20 years. Which makes him very productive, but that's not all there is to it. He is also a person who considers it part of his job to go above and beyond when it comes to customer service. Once, when delivering a T.V. stand to an elderly lady who was waiting for him at the door when he arrived, he not only brought the package into her home rather than just leave it on the porch and hurry off to his next delivery, he assembled it for her because he discovered that she lived alone and wouldn't be able to manage it on her own. And, by the way, he was still ahead of schedule when he finished his run for the day.

The second method is to do something that is often scary for some supervisors….which is get the heck out of the way and let people do their job without being micromanaged at every turn. Remember, Part Two of your 3x5 index card customer service policy, is "Use Your Own Best Judgment In Any Situation." That means, of course, that you need to be the type of supervisor who understands that *"lead my people"* (which is exactly what an effective service manager does) means empowering them to make decisions. It also means that sometimes an employee can make a decision you would have preferred they didn't make…OK, a mistake. When that happens, it isn't the end of the world, and supervisors who empower the people they lead know that an opportunity, rather than a problem, has presented itself. It's an opportunity to learn, not just for the one employee involved, but a situation that needs correcting or even just fine-tuning can be the subject for your next regularly scheduled meeting.

(What's that.....? Meetings can easily turn into nothing but a "bitch session" for technicians and you would rather avoid that? OK, we'll give you some tips on conducting effective meetings. But first, let's move on to the underlying goal of providing outstanding customer service: Your customer's relationship with your business.)

The ultimate process goal of any business is twofold: 1. Build a relationship with your customers. 2. Insulate them from the competition. Think of it as being a simple target with a bull's eye in the center and two outer circles. The bull's eye is best thought of as your basic service requested by your customer, whether it's related to a repair of some sort or the purchase of new equipment. And for many service businesses, that's often as far as they go. They feel as though hitting the bull's eye is all they really need to do, and with that task accomplished, it's time to move on to the next customer. But, there are the two outer circles of our target to consider.

"Even a turkey can fly in a tornado."
Eugene Keiner

The second circle is where additional services or accessories can be offered to your customer. If your business lends itself to maintenance agreements, that's an additional service. Or, if there's some type of specialized product such as a stainless steel counter cleaner, or a smoke alarm, or carbon monoxide monitor, or wood preservative, or whatever, that's an accessory item. Accessories that generate additional revenue are a fit for just about any business. All it takes is some creative thinking.

Have you ever been to a well-run, progressive car wash? When you pull up, there's a representative who greets you and let's you know the various prices and packages they have available. Once you make your choice, you go into the office to pay for your car wash, but there's more there than just a register. You can buy a soft drink or juice and a snack to enjoy while you're watching out the large windows and your vehicle moves along through the various brushes and sprays. Or maybe you need a custom steering wheel cover, or you just remembered an upcoming birthday or other event, and you would rather browse through their greeting card rack. Or, maybe you've decided it's time to take a moment to relax and invest two dollars in one of the massage chairs sitting there waiting for you. Greeting cards? Massage chairs? In a car wash? Yes…..and why not?

Think about it….what kind of accessories or additional services could you and your front-line customer service employees regularly make available to the person who calls your business for a basic service?

"Your front line affects your bottom line."
Unknown

Understanding the effectiveness of the second circle of your target and implementing a philosophy of offering accessories and additional services there, brings you to the third segment of your target, the outer circle. This is the insulation circle because it is actually your customer's relationship with your business. When you are not only taking care of their basic needs, but also *providing them with other products and services they want and need*, why would they look elsewhere the next time they need the basic service that is your bull's eye?

Note that we emphasized the idea of providing things that your customer wants and needs. They may not know that they need something, or their want for it may not be at the forefront of their thoughts at the moment, but if your customer service philosophy is to make them aware of additional services and/or products that provide a real benefit for them (not selling them something they don't need or using scare tactics to sell them safety items) you'll work toward building that outer circle of insulation. And it's at this level of customer service that you'll not only enjoy repeat business. A customer who feels as though they have a relationship with your business is often willing to provide you with the second thing we mentioned that any business needs in order to grow and proper: Referrals. A referral that not only doesn't have a marketing or advertising expense attached to it, but actually came to you simply because you generated additional revenue via an offering of over-and-above customer service.

By the way, you'll note that all along we've been discussing the idea of outstanding *customer* service and providing over-and-above *customer* service, not shopper service. There's no doubt that you'll encounter shoppers in your business. That's OK. Just remember the difference between a shopper and customer.

A customer shops for value. A shopper shops for price.

And a shopper who is shopping for nothing but price will always find a low-baller willing to be the lowest price in town. That's OK too. Shoppers and low-ballers deserve each other. Let them be. Focus your efforts on *customers* and understand that every ring of the phone isn't going to result in scheduling a job or service call. Low-ballers who focus mainly on price don't create a culture of customer service, and the smallest chink their operating plans can put them into the red at any given time. That's not an environment that people…and c'mon, employees are just people who happen to be accepting the task of doing a specific job…like to be in. It just isn't fun, and part of an environment that fosters loyalty and dedication to doing the best job possible is that there should be some fun in it in addition to taking home a paycheck.

Your regularly scheduled staff meetings can be fun when you have implemented a system in which customer comments can be solicited in follow-up surveys, either via phone or mail, and then celebrating, and we mean *celebrating*, when an employee gets a good review from a customer. Celebrating may involve awarding dinner for two at a decent restaurant, or it may be movie tickets, or maybe it's a cash award. Whatever award you decide to bestow on a top performer on your team, *celebrate* when one is earned. One of the top needs of any human being is to be recognized for their accomplishments (remember Segment Two, Knowing The People On Your Team) and it's a simple fact that behavior that is awarded is repeated.

"My paycheck may come from the bank, but I work for the client."

A Bank President

Jon Gordon, author of The Energy Bus uses the analogy of getting your people on board your bus and creating a team spirit within your organization that fosters enthusiasm, positive energy, and dedication to doing the best job possible for the customer. Taking his idea a bit further, consider this: Getting people on your bus is a good thing. In the event that your bus breaks down, though, and those who are on it are willing to get out and push, that's even better.

Of course, you have to invest in more ways than one to create that kind of team spirit and dedication, which means you can't be the lowest price in town. When considering the price issue for your products and services, there's a simple philosophy to keep in mind. If a customer says "That's too much," there are only two reasons they're saying that:

1. They don't have that much money, either in their pocket, in their checking account, or as buying power on their credit card.

2. You haven't shown them why your products and services are worth the money you're asking for them.

There's nothing you can do about #1. If they don't have it, they don't have it. But when it comes to #2, making customer service part of your culture, training effectively in what you want your front-line people to say and do when dealing directly with your customers, ensuring that everyone in your organization believes in providing outstanding customer service, and celebrating when it all works out, will help your customer understand why you're worth your price.

Conducting Effective Meetings….

One of the things we mentioned that is a common concern of service managers relative to meetings is that they can often turn into a “bitch session”. No doubt, that result can be exasperating and it’s natural to have a tendency to avoid meetings if you’re concerned that that’s what they can become. But, effective meetings are a hallmark of excellence in any organization that promotes a culture of customer service, and the growth and development of its people who are committed to providing outstanding customer service *(which means that you simply <u>have</u> to do them)* and there are ways to keep them from getting out of hand.

When it comes to conducting an effective meeting, the process starts with notifying those who need to attend, and doing it in writing. In some cases, posting a memo on a bulletin board might be sufficient, but often, it’s more effective if you provide everyone with a copy of the notification memo. (For some simple memo format ideas on effective written communication, see Appendix B)

To conduct and effective meeting:

…Use some method to list the agenda items, and check them off as the meeting progresses. The most effective way to accomplish this is to hand out a written agenda to everyone attending, and also have the same agenda items listed in some fashion where you are standing as the center of attention. This could be on a flip chart, or if you’re used to working with an overhead projector, you can make a transparency (all you need is your office copy machine and the proper transparency material from the office supply store) so you can show a copy of the agenda at the front of the room.

…To keep the meeting on track, employ the “parking lot” method because a natural thing often happens: You’re directing a discussion on the subject at hand, and somebody comes up with an “idea” or “alternate thought” or a “what if” (yes, this offering of information could be an honest contribution or it could be from a less-than-positive perspective), and you need to keep the meeting on track without appearing to alienate the person who has spoken up. The parking lot method is simply having a flip chart page with the title

“Parking Lot” at the top. When an idea that is off-track is presented, simply thank the person for their contribution and list it on the parking lot page with a comment that you’ll get back to that item once you’ve gone through the original agenda. By the way, a parking lot item can become an agenda item for your next meeting.

…In a brainstorming meeting, assign somebody the task of making large notes on flip charts that can be taped up around the room.

…Overhead projectors are the simplest form of visual equipment to use and the presentation can be colorful if necessary.

…A “prepared notes” method that is interactive or allows space for notes directly related to the topic at hand keeps people on track and provides them with an effective follow-up reference.

Jim's Notes On Segment Three…..

One way to become adept at customer service is to be a consumer yourself and watch closely how things are done when a business you're buying from does it well.

Often, we show up at a hotel very late in the afternoon to check in and prepare to facilitate a workshop the next day. Once when this happened at the Little America Inn in Flagstaff, Arizona, I discovered that the meeting room assigned to us (due to the arrangements being made by a third party who didn't do their homework) was too small for our group and wasn't going to work at all. Often, when this happens, I get nothing more than shrugged shoulders from the person at the front desk. But this time was different. The young man (and I mean *young*….I'm sure my driver's license was older than he was) immediately picked up the phone and summoned a supervisor. When that person showed up, the young man said to him, "We need to get another room assigned for Mr. Johnson's workshop tomorrow. The one we have set aside for him won't do."

The supervisor simply nodded and asked the young man for a suggestion on what to do as far a juggling the room assignments. There was no pretense of "I'm the supervisor here and I'll decide what to do,". There was no ego, no being threatened by an 'underling'. The young man was the one who had "caught" this particular problem and it was his to solve. The customer….me….was what mattered and there was no reason to waste time on anything else but the customer. Within seconds, I was escorted by the supervisor to another room, and his only question was if it would suit our needs.

The next day, I went into the meeting room at 7AM to get ready for an 8AM start time. When I entered, I was greeted by Raul. He announced that he was there to make sure I had everything I needed and was more than willing to help with any set-up that needed to be done. Once the room was set up and people started showing up to check in, I noticed that Raul was still there, waiting at the back of the room, almost standing at attention. Since I was caught up with greeting people and getting them checked in, I never got the chance to ask him why he was waiting there. Once my workshop was underway, though, and it was clear to Raul that I had begun, I understood. It wasn't until that moment that Raul decided it was OK to leave the room. It was clear that his mission was to be certain that I was underway before he left to handle his next assignment.

Later that morning, I needed to communicate via fax with a client in Kansas who needed confirmation regarding their employee's attendance at the workshop. When I entered the hotel sales office, the first person I spoke to assured me she would handle it. I went back to the meeting room to continue the workshop, and a few minutes later she quietly entered, nodded while showing me the paperwork I had left with her, then set it down on the table and slipped out of the room unnoticed by anyone but me.

Still later in the day when I had to go back to my sleeping room for something, I discovered three people there. Each of them was holding a clipboard and they apologized profusely, explaining that they were doing a spot check on rooms serviced by the housekeeping staff, and my room happened to be on the list that day.

There are two things that are obvious about my experience at this hotel. First, they're not going to be the lowest priced in town. Second, there's no reason I would consider booking an event anyplace else in Flagstaff, Arizona without checking with them first. The point is that in any customer service situation, first-time shopping may be price sensitive because, after all, your customer is still trying to figure things out. When it comes to repeat business, though, price is usually not the issue foremost in the customer's mind.

Another way to keep customer service at the forefront of your business philosophy is to remember when things don't work out so well.

Recently, on a 5,000-mile trip on a unique vehicle…a trike, which is part motorcycle and part car….I had an experience that reminded me how simple it is to be customer-focused, and how often some organizations simply can't do it. When I developed a rear brake pad problem I stopped several places for help, and was absolutely flabbergasted at the inability of some people to think outside the box. "We don't work on motorcycles," was the reply I got at the first three places I stopped, no matter how much I explained that the segment of the vehicle needing service was actually a car axle, with car wheels and tires…and car brakes.

One person was so frightened by the prospect of a liability issue; he said he wouldn't even be sure how to put a jack under the axle to raise the wheel. Another said that since there were no direct identifiers on exactly what the part number of the brake pads would be, it "would involve checking through a lot of boxes" in order to find a match. I said I would gladly do the searching, but that didn't help.

Finally, we found a group of automotive technicians at a Meineke brake and muffler shop in Santa Rosa, California who weren't afraid to figure out how to jack the vehicle up, and realized that brake calipers were brake calipers whether there happened to be a car body attached to the axle or not. They got us back on the road, but the saga doesn't end there.

Upon completing the repair, the technician had only general information to go on relative to tightening a wheel nut, and we agreed on how tight he would torque it down. Subsequently, after being in touch with the trike manufacturer and getting specific information, they advised me to have the torque level of that nut set higher. Again, I couldn't even get an automotive service shop to consider touching the vehicle. In the end, I wound up purchasing the correct deep well socket and wrench so I could handle the situation myself.

My point in discussing these two situations is that in my opinion, it all comes down to attitude, either a "can do" or "can't do" approach to doing a job. And it's also my opinion that the vast majority of the time, attitude is something that can be planned for and molded by an effective leader. The planning is in the hiring of the right person, and the molding is in the training, guidance, coaching, and leadership provided for that person during their tenure as an employee. In the next segment, we'll cover planning and molding an effective work team.

SEGMENT FOUR: HIRING, TRAINING & COACHING

A man bought a custom-made suit, and when he tried it on, he had several complaints about the way it fit.

"The right sleeve is too short," said the man to the tailor.

"That's no problem," said the tailor, "you just have to allow time for this suit to hang to your frame. Until that sleeve fits perfectly, just hold onto the end of it you're your fingers, and keep your arm out straight."

"But look at this lapel," the man complained, "it's sticking up in the air."

"We can solve that too," said the tailor. "Just put your head down and use your chin to hold it in place. Eventually, it will stay there."

Then the man said, "The left pant leg is too short!"

"That's easy," said the tailor, "all you have to do is throw your foot out straight before you take a step, and soon, the pant leg will fit fine."

The man left the tailor shop with his right arm pointing straight down and holding onto the sleeve of the suit, his chin down on his lapel, and thrusting his foot out with every step. Two ladies noticed him. One said, "Oh, look at that poor man."

"Yes," said the second lady, "but that's a beautiful suit he's wearing."

Sometimes, things are not as they appear. And when things are not as they appear in the process of hiring a new employee, the results can be around a lot longer than the tenure of the person that winds up being terminated.

Hiring the right person for the job is the first step in the ongoing process of developing people and molding the most effective team for your business or department. And there is a lot to be said about evaluation techniques, interviewing skills and making hiring decisions, but there is one overriding factor to consider overall.

First, never be afraid in hiring. If you find yourself sitting across from someone at your desk and your impression of them is that they are extremely talented, even more talented and skilled that you have ever been or could hope to be, don't be afraid. Some supervisors have been known to pass up hiring an extremely talented candidate because of an underlying fear that they might wind up getting the job of the person who hired them. Remember, part of a supervisor's commitment to excellence (Segment One) is …"I will always have one person in training to replace me." So when you encounter someone whom you think has a great attitude, will embrace your philosophy of customer service, and be a contributor to the effectiveness of your team, don't be afraid. Hire them.

Of course, there are some things to be afraid of when considering a new hire. There's an old joke from personnel and HR people that you should never hire anyone who is accompanied by their:

…attorney with a tape recorder
…bodyguard
…teddy bear
…police escort
…mother

Seriously, though, there are some simple facts and procedures that can help you be successful in hiring. The first is what to look for in the initial interview process.

…A positive attitude
…Integrity
…Responsibility
…A good self-image
…Ability to both follow and lead
…self discipline
…Ability to bounce back from "failure"
…A sense of humor
…Flexibility
…Able to see the big picture

"Hire for attitude: Train for skills."
Southwest Airlines Philosophy

You can increase your odds of hiring the best people by:

…Investing the time and energy in an effective background check and/or Googling the applicant.

…Asking the right questions at the initial interview, such as:

"Tell me about your experience in…."

"What do you think of……?"

“Tell me more….”

“What do you like most about your current job?”

“Tell me how you would or have handled the following situation….”

Don’t say: “Tell me about yourself.” Asking someone what they would have done if they had to handle a specific situation you describe will give you much more insight to their attitude and aptitude.

There are 8 things you don’t want to hear from an applicant during an interview:

1. “I hated my last boss.” Even if they do, they shouldn’t be telling you about it. It’s just trash talk.
2. “I don’t know anything about your company.” With the technology available to all of us today, a person applying for a position with your company should be able to find information and learn about your organization.
3. “I don’t have any questions for you.” A statement like this often signals a lack of interest.
4. “I’m going to need these days off….” If this is brought up early in the interview, it could be a red flag, meaning that you won’t be able to depend on this person when the chips are down.
5. “How long until I get a promotion or raise?” There’s nothing wrong with wanting to know about this sort of thing, but it could be expressed differently, such as “Can you explain a typical career path for your employee?”
6. “Are you religious?” You’re not allowed to ask this question, and they shouldn’t either.
7. “Einstein once said….” This type of response to a question is usually a scripted one, indicating possible insincerity.
8. “I’ll tell you what else I hate…..” When this kind of information is offered up, it often indicates a chronic complainer.

Asking questions and letting them talk can help you determine their personality type: Director, Socializer, Thinker or Relator… and decide how they would fit into a given position because of their personality type.

After the initial interview, schedule a second one that, whenever possible, includes a panel (an odd number of people) made up of the others in your department. Hiring through this method usually results in the best fit for the team. It also heads off discriminatory lawsuits because a group of people were in on the decision. Another benefit to using the panel hiring method is that it goes along with your commitment to always be training someone to take over your job.

After you've hired a person, the training, coaching and mentoring begins. Take the time to tell them on their first day why you hired them. This will make your expectations clear them while at the same time influence them to perform as effectively as possible. It also slams shut any doors that a new hire may want to try to walk through later.

"The reason I hired you is because I know you are the kind of person who can handle things that come up without coming to me to get confirmation about every little thing."

Telling someone why you hired them is a powerful technique to building self-esteem. The best work is not done for just a price. A leader needs both the head and the heart of a team member whose pride will not allow them to do less than their best in any situation.

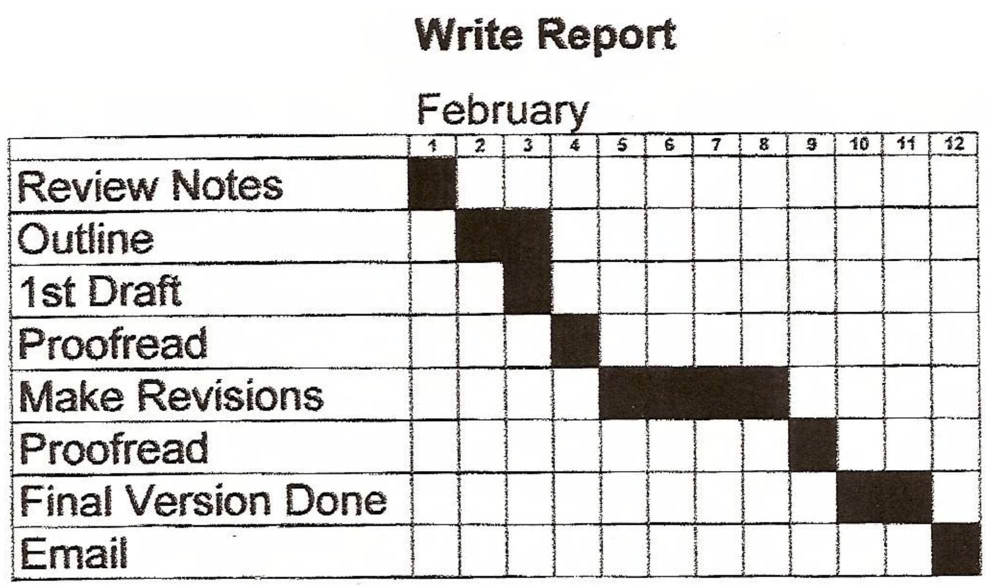
Once you have a new hire in place, there are specific steps you can take to contribute to their development and benefit from their being part of your team.

1. Lead, train, coach and empower them. There's a risk with this but it's the best way to let people grow and develop. You need to have the "intestinal fortitude" to step back and let them do things on their own. Remember, some people will be scared about this because they may not have any experience working with an effective, assertive leader. Let them know early on that they can "fail forward" without putting their job in jeopardy.

2. Put goals and expectations in writing. A goal contract, a written agreement between an employee and a supervisor that outlines specific goals for the upcoming quarter or upcoming year, is an effective way of keeping on track.

3. Make sure people know what your vision is. When they know it, they'll want to pull with you. As we said, think of people as willing to get on board your bus and ride along with you…and be willing, if the bus breaks down, to get out with you and push.

4. Once you and everyone on board with you understands the vision and sets goals according to the vision, develop and follow a plan to get things done, not only for yourself, but for your people too. One example of simple, effective plan is a GANNT Chart.



5. Get out of their way and let them work, but be there to block roadblocks to their success, and shield them. Let other department supervisors know that if they have a problem with one of your people, they need to talk to you and only you. When people know you are willing to protect them, they'll want to defend you if it's ever necessary.

6. Give frequent praise when it's earned. If you're praising a Socializer or a Relator, do it in public. If you're praising a Thinker or a Director, either do it in private or get their permission first before taking it public.

7. Remember that if you ignore your good people, they will leave you. If you ignore a troublemaker, they will stay and develop friends.

8. Practice MBWA…Management By Walking Around.

9. Ask anyone who reports to you this question: “What makes you proud to work here?” If they can’t answer, you have your answer….they’re not, at least not as much as you would like them to be.

10. Ask anyone who reports to you this question” Why is what you do every day important to the success of our department? When they can answer this question, you will reduce your turnover, absenteeism and tardiness problems.

11. Ask yourself this question every Monday: “How am I better this Monday than I was last Monday?”

12. Implement the 1 to 10 scale system. Take the three most important tasks a person has to accomplish and assign a specific number according to your assessment of how they are doing on those tasks…..6.5, 8.2, etc…breaking each number in the 1 to 10 scale down into ten parts allows you to show the smallest level of improvement in a person’s performance. Meet with them in private to let them know this is your assessment and that your goal for them is to improve their numbers. If it fits the personality of your company, (and yours) you can make the numbers public. List the most important tasks of the individuals on the team, and assign a specific number according to performance. Post it poster-size on the wall. When things improve, post the new number.

All of the things we’ve listed above are hints on what to do from a nuts and bolts perspective. Underlying any procedure, though, is the attitude that is handed down by a supervisor. It’s simple, and we’ve pointed it out before in previous segments: The attitude of the team is directly related to the attitude of the team leader.

"The greatest discovery of mankind is that a person can improve their life by improving their attitude."
William James

It is the supervisor's responsibility to take a positive approach and maintain a good attitude. A fundamental fact to understand about attitude is that a key factor in attitude is physiology. And one of the most important factors relative to physiology is…smile! Smile genuinely. Smile so it reaches your eyes. When a smile reaches your eyes, people know it's a genuine smile that comes from your heart. In human physiology, there is almost no control of the muscles around the eyes, but a high level of control of the muscles around the mouth. Which means that if a smile "reaches your eyes" it's genuine.

Another factor that has an effect on your attitude is your physiology, which goes beyond smiling. If you were to stand up and assume "The Rocky Pose", a classic illustration of the triumph of human spirit over adversity, you couldn't help but be energized and affect your attitude. Consciously and purposefully keeping your shoulders back, your back straight and walking in brisk steps are all factors in adapting a positive physiology that leads to maintaining a positive belief in your ability to do your job which is, as we've said, to lead your people.

And leading means learning something, and then teaching it to others. It means learning to cross the line from being a group to a team.
When you note that one person on a team is willing to help another without being asked or directed to, or when you note that somebody on a team naturally takes responsibility to handle a situation (whether you're there or not), then you know you are being effective at leadership.

Smiling, maintaining a positive physiology, and adapting to other personalities are three basic elements of people skills for supervisors. Others are:

….Actively Listening (The 80/20 rule: Listen 80% of the time, Talk 20% of the time)

….Making Others Feel Important (It's human nature to be tuned into radio station WIIFM: What's In It For Me.)

….Persuasion and Influencing (Not Manipulation)

The difference between persuading and influencing others as opposed to manipulating them is clear simply through the definitions found for them, along with a related term, in Webster's.

Persuade: To influence by argument, entreaty, etc… to win over.

Entreat: To ask earnestly, to make an earnest request.

Influence: To sway, to induce.

On the other hand, the dictionary defines manipulate this way: To manage a person in a skillful, unscrupulous way; to falsify.

When you examine these terms from this fundamental perspective, we only have to employ one other term to understand how they apply to an effective supervisor: Intent. What is your real intent? If it's honorable, then you'll be able to apply your communication skills in such a way as to get you team to function at as high a level as possible.

The point to understand here is that the skills themselves are neither good nor bad; it's how you choose to use them when dealing with others. Using your skills effectively and assertively will allow you to develop insight. Having insight is pulling your knowledge and skills together to do the right thing. And as you develop your insight, you have a responsibility to allow the people on your team to learn how to develop insight. Insight isn't something that can be taught. You can only allow people to develop it, and in the process allow them to become assertive.

Some facts about assertiveness:

…Assertiveness leads to confidence.

…Being assertive is being mutually respectful.

…An assertive supervisor is less likely to be sabotaged.

People sometimes assume that assertiveness is acting aggressively. However, the difference between an assertive supervisor and an aggressive supervisor is simple: An *assertive* supervisor leads by effectively communicating what needs to be done in a given situation. And, if the task they're asking to get accomplished isn't going to work out the way they think it will, they will get feedback from the team member and avoid a problem that the supervisor didn't see.

An *aggressive* supervisor gives a direction. The employee knows that the direction will lead to disaster, but they follow through in order to sabotage the supervisor. When called on the carpet to explain what happened, the employees response is, "I just did what you told me to do."

"80% of mistakes in the business world are the direct result of poor communication."

Tom Peters

Here are 3 ways to be a leader and apply assertiveness:

1. Ban the word "try" from discussions. Explain to everyone that you don't want people to tell you what they are going to try to do. You want them to tell you what they're going to do so you can hold them accountable.

2. Don't bother with "ASAP". Instead, be specific…"I need this by Thursday at 2PM. Once you have a specific commitment from somebody, you can hold them accountable.

3. When giving instructions, use your insight to decide if you need to have people give the information back to you in their own words.

Assertiveness works in all situations:

….An older supervisor dealing with a younger person.

…A younger supervisor dealing with an older person.

…A female supervising a male.

…A male supervising a female.

…Same age, same gender.

In today's workplace it's possible to have 4 generations at one time. The key to supervisory success in such a diverse workplace is assertiveness.

"Being a supervisor shouldn't be like a cemetery operation: A lot of people under you, and nobody's listening."

A leader is a person who gets people to do what needs to be done because they want to do it. An effective leader must always look, act, and sound like a leader.

There are three fundamental "Vs" of communication:

1. Verbal: This is 7% of communication, and although it's only a small part of the communication process, it doesn't mean that our words are not important.

2. Vocal: 38%…how fast, slow, loud or low we speak, tone of voice.

3. Visual: This is 55% of communication…posture, dress, facial expressions, body language…everything the other person sees when they are communicating with us.

Communicating effectively and assertively (and adjusting your communication when necessary) gives you confidence. And being confident shows that you:

…Are aware, with valued opinions.

…Look like somebody who is in charge.

It is often said of confident leaders that they have “charisma” a “presence” or a “magnetic personality. What leads people to feel this way about a leader is their listening skills that cause people to like being around them.

Here’s a listening skills list that will give you a range of suggestions:

1. Move closer to the speaker. Take a step or two in their direction, but don’t get too close.
2. Face them squarely.
3. Make eye contact for 4 to 6 seconds at a time.
4. Remove distractions. If there is a great deal of activity going on behind you, adjust the positioning. Hands are also a distraction.
5. Practice the 7-degree lean. A slow, slight lean in the direction of the speaker is extremely powerful and barely noticeable.
6. Let the speaker finish.
7. Ask questions….intelligent ones.
8. Take notes. Use a small, spiral notebook, hold it low so as not to block your vision (or the vision of the person you’re communicating with) and take down a few key words.
9. Paraphrase what they said.
10. Pause. Think before you respond, and be aware of the human response to pauses. Waiting 1 to 3 seconds will get you a reputation for being wise. Waiting more than 3 seconds will get you a reputation for being stupid.

When you are continuously working on your communication and listening skills, you will tend to be consistent and, to a point, predictable. Being consistent means that you don’t just take a position on something, you take a stand, even if it isn’t politically correct. If you take a stand, you lead by example, and one of the benefits of leading by example is that people who report to you are more likely to do the right thing when you’re not there.

Rewards….

And when your people do the right thing, they're entitled to be recognized, and the responsibility for that falls squarely on your shoulders. An effective, assertive supervisor understands that Recognition is the #1 thing employees want once they are sure that they have enough money for their survival, a night out now and then, and a small amount to put away in savings. Recognition is a basic human need. If a 5-year-old isn't getting enough attention from their parents, they'll throw a tantrum. An adult may not throw a tantrum if they're not getting enough recognition, but they'll find ways to be creatively negative. One way to keep the people on your team interested in doing the best job they can do is to have an active rewards program….something other than the commission they earn or the hourly wage they're paid.

Reward Ideas….

…The 59-minute reward. Leaving early on a Friday (for hourly people)

…Casual dress day

…Pot lucks (barbecues or chili cook-offs for guys)

…The traveling trophy (the goofier the better…it could be a rubber chicken that the top performer gets to have on their desk or in their service van for a week, or whatever time frame fits your business.)

…A car wash by the boss at lunch hour (this becomes a social event)

…Boss for a day (obviously, set guidelines before implementing this one)

…Gift certificates (a variety)

…Time off

…The best spot in the parking lot

The idea behind any effective rewards program is that it shows recognition from above. One symbol of honest recognition, one that doesn't have a price tag at all on it, is a warm, positive handshake and eye contact, along with using a person's name while recognizing them specifically for a job well done. Consider handing paychecks personally along with a handshake and "I'm glad you're working here."

Delegation….

Another key to being a successful service manager is the ability to delegate. Not all supervisors are effective at delegating, for a variety of reasons.

Why some supervisors don't delegate:

…They think they can do it better themselves.
…They're afraid they might lose control.
…They're afraid the person might make a mistake.
…They feel threatened.

What you can delegate:

…Anything they can do better than you.
…Anything they can do instead of you.
…Anything they can do at less expense than you.
…Anything they can do more efficiently than you.
…Anything that will add to their development.

Delegation Guidelines:

Who…pick the right person.
What…explain the results you need.
Why…tell the reason for the task to build interest.
Where…Explain how you and they fit into the big picture.
How…Specify if necessary, otherwise let them go with it.
When…Outline specific checkpoints, timelines and follow-up.

In a perfect world, anyone on a team is open to being on the receiving end of delegation, being more than willing to take on a task. However, it isn't always a perfect world and some employees resist taking on assignments. Why? The real list is short:

…They don’t get feedback from their supervisor.

…The just don’t have the time.

…They’re conditioned to rely on the boss.

One last hint on delegating….remember to tailor tasks to strengths, encourage questions, be patient, use mistakes for learning value, and beware of overloading your high achievers.

Discipline….

Let’s face it. Sometimes, no matter how effective you are in your communication skills, planning and leadership, there may be a time when you have to be a disciplinarian. Disciplining an employee is often a supervisor’s least favorite task. Why some supervisors don’t discipline:

…They want to be liked. (Enforcing rules, policies or procedures often won’t win popularity contests.)

…Other supervisors don’t do it. (Employees often remind supervisors of this.)

…”I’m not always at 100% myself, so how can I expect others to be perfect all the time?”

…”Upper management might not support me.” (In most cases they will, providing you document fully.)

When facing the challenging task of discussing a performance problem with an employee….

…Pause. Analyze the problem as completely as you can. Be as certain as possible of the situation.

…Make sure the employee understands what the problem is.

…Make sure the employee really understands what the expected performance level is.

…Make sure the employee understands what will happen if the performance standards are not met.

…Are you sure you have all the facts? Who, what, where, when, why and how?

...Privacy is nearly always preferable unless it's an immediate safety or danger issue.

…Discipline in private with a witness, someone who is another member of management, and make sure they are positioned either behind or out of direct eyesight of the person being disciplined. The witness may unconsciously react with eye or facial expressions, or in other ways, to what is being said and that can create problems for you either during or after the meeting.

…A person being disciplined should be able to choose their own witness to present at the meeting in addition to the other member of management you've asked to attend.

…If no other management team member is available as a witness and you need to handle something immediately, at least discipline out of earshot. Let the employee know "….this is the behavior I'm addressing now, and we are going to meet about it at…."

Remember, as an effective, assertive supervisor, you never fire anyone. They fire themselves by choosing to exhibit behaviors contrary to the rules and guidelines of your organization.

Coaching As Part Of Discipline….

An effective leader does everything they can to allow an employee the opportunity to develop and do the best job they can do. Coaching will sometimes be a part of discipline. Here are some simple steps to understand about coaching while disciplining an employee.

…Discuss performance issues, not the person.

…Limit your discussion to the facts: no assumptions.
…Be prepared to back yourself up with documentation.

…Listen more than talk to allow for venting.

…Share the blame if necessary.

…Don't make upper management "the bad guy."

…Focus on the future.

…Use mistakes for learning value.

…Summarize what's said and agreed to.

…Put things in writing when necessary.

…Allow the employee to save face.

…End by saying your confident that things will improve.

…Plan a follow-up meeting.

Remember, you're not there to argue, deny or defend. Stay focused on your objective, slow down when you speak and lower your volume a bit. Be prepared for denials or resistance and respond to them by repeating what you said.

Discipline is a necessary tool that's not to be enjoyed. Be assertive and let the employee know that the closer they get to crossing the line, the more assertive you'll be. Make sure they understand that it's their choice whether or not they step over the line and that once they do, your hands are tied legally, and you'll reluctantly follow policies to the letter.

And, remember, the three most important things about discipline situations: Document, document, document.

Coaching and Mentoring….

Coaching and mentoring sometimes involves dealing with one person at a time, or you can be an effective mentor to a group. We've already established that an assertive leader who holds his or her team up to a higher-than-normal standard, knows how to motivate by delegation, is willing to give some responsibility and grant some authority.

"A leader has a vision, then helps others to find their vision…and then sticks around to help them go get it."

A leader also expects that there will be some time spent dealing with things that happen every day. As a coach and mentor, a leader focuses on a solution to a situation instead of dwelling on the problem. One way to accomplish this is to ask 4 questions when things don't go exactly as planned:

1. Where are we now?
2. Where to we need to go?
3. What do we need to do to get there? (Specific action steps to take…who has to do what…what planning needs to be accomplished)
4. How can this problem be prevented in the future?

When dealing with things that happen every day, you may have to let people know you're not happy with the situation. When you do, never use "You" in any comment.

Expressing yourself this way…."I'm upset because now we have to spend time and money fixing this situation"…. is one example of expressing yourself without appearing to be finger-pointing or singling someone out for blame, even if you could.

Conducting An Effective Counseling Session As A Coach and Mentor….

Sometimes when problems in performance occur, you need to not only counsel, but also mentor someone in a one-on-one situation. (Even when you have another management staff member in the room witnessing and observing, the session is still yours only)

To begin, there are 3 questions an effective coach/mentor <u>never</u> asks:

1. What's wrong with you?
2. What are you going to do about this (or that)?
3. Why are you doing this to me?

Here are ten steps to effective counseling and mentoring:

1. Assess the situation by making sure you do your homework ahead of time.

"It is a capital offense to theorize before one has data."
Sherlock Holmes

2. Find out what they know before you begin counseling.
3. State facts in a non-threatening manner.

"I'm told that what happened was….."or,

"Tell me what you know about that."

4. Ask them about the impact of their actions.

"When you come in late, how does that affect your co-workers and your performance review?"

5. Focus on a solution.

6. Have them write out their action steps in a time line. Don't write out their action plan for them, give them all the time they need to write it, and then make a copy of what they wrote.

7. Let them tell you what happens if they don't solve the problem….what the results will be if there is no change.

8. Reinforce progress.

Schedule a time to reassess.

Implement the "LB, "NT" approach. Tell them what you "Like Best" about their progress and let them know what you would like them to accomplish for "Next Time".

Direct them to write a memo…."I need you to write me a follow-up memo, stating what we agreed would be done." (Yes, we know how much resistance you may encounter when you tell a technician who isn't a "writer" that you want a memo from them, but stick to your guns on this one. It will reap benefits not only for you, but for the technician in their professional development.)

9. Respond to the "It's not my job" comment:

"Your job description includes other duties as assigned."

10. Use the right language to close a session.

"I respect your willingness to have this conversation."

"I'm glad to see that you know you can do it."

"I'm backing you up on this."

Dealing With The Unexpected….

Since there's no denying that people are people, you should be prepared (at least as prepared as possible) for dealing with the unexpected during a counseling session:

Anger: "I need 30-minutes. At 11:30, we'll address this issue again." Then follow through, no matter how angry you might want to be at the moment. Call a recess.

Tears: Give them a Kleenex and say, "I need to take care of something else. I'll leave the door closed and be back."

Denial or Contradiction, such as "I didn't do that.": "I understand what you're saying. It doesn't change the fact that we have to deal with this issue."

Silence: When dealing with this behavior, you can let them know you are leaving the room for some "think time", or you simply need to be able to sit in silence longer than they can.

Meltdown or Threats: Recognize that this could be a sign of severe personal problems or substance abuse. When dealing with this issue, consider leaving it to a professional, but be sure to cover yourself and your organization from a legal perspective.

Don't Say…"You need to calm down." Or…"You need professional help."

<u>Cover yourself</u>…."I'm hearing something that I'm not qualified to address." Or…"The only thing I know to do is to keep a list of resources for myself."

If you don't have a separate HR department, have your own list of 3 counselors and 3 substance abuse counselors, and be careful how you present the list. <u>Have only one copy on hand</u> and ask, "Would you like a copy of my list?"

If they say yes, take your list out and make a copy in front of them.

The reality of mentoring is that it's about the other person. A mentor…

…Strives to be an active listener.
…Sees more potential in someone than they see in themselves.
…Strives to be patient.
…Makes time for others.

"Plant a tree in whose shade you will never sit."
Dennis Waitley

A Reality Check….

Keep in mind that even as a coach/mentor, things don't always work out for every employee, and if you've done everything you can do to help someone, but things aren't changing, you really only have 4 final options in a counseling session.

1. Refer them for professional counseling.
2. Re-assign them to other responsibilities.
3. Relocate them to another department.
4. Terminate.

If you get to the point of talking termination, here's one way to say it:

"Based on the job description, your performance relative to your job, and what we've gone through here today, it's clear that you've chosen not to work here anymore. The question is would you would prefer to resign or be terminated?"

You may modify this statement if you're planning on dealing with issues such as contesting unemployment compensation claims, or other reasons, but sticking as close as possible to such a statement will always cover you relative to legal situations.

Since we had to get into the subject of termination, we thought it appropriate to end this segment on a positive note…

Remember that there are certain traits of a highly successful work team. A leader makes sure that team understands….

…A shared purpose and mission.
…Scorekeeping is not the norm.
…Shared operational values.
…Roles and procedures are always clarified.
…Meetings are effective.
…Necessary decisions are made and held to.
…Conflict is confronted and resolved.
…There is an opportunity to self-assess and correct.
…Rewards are shared.
…Celebrations are the norm.

And, above all, a leader understands that their primary purpose, no matter what the "nuts and bolts" of the tasks at hand are, is to:

1. Lead.
2. Communicate.
3. Teach.
4. Inspire.
5. DEVELOP YOUR PEOPLE!

Jim's Notes On Segment Four….

If you're someone who buys things, you likely know about Costco. They started out as a company known as Price Club and in a relatively short time, they've become the most successful warehouse store chain in the U.S. One of the reasons they've been able to accomplish that feat is their philosophy on employee development.

Their CEO, Jim Sinegal, has been quoted as saying that "…80 percent of management's job is to teach, teach, teach."

O.K., your organization isn't the size of Costco, but that doesn't mean you can't adopt their overall philosophy of employee development. From the perspective of service management, consider the idea that everything…everything you do and say is, essentially, providing a teaching opportunity for those who report to you, both in the service and administrative departments you may manage. I mentioned earlier that a technician-turned-service manger often has some difficulty dealing with the idea of no longer being involved in what we refer to as "honest labor".

Well, effective leadership is your new "honest labor" when you become a service manager. And, it's often a lot more work than the skills you used to get into that supervisory position. You need to be constantly aware of the needs of the technicians and others who report to you and what you can do to help them along their way from both a professional and personal perspective. Every time you assign a task, give advice on what to do about a given situation, conduct a meeting, counsel, delegate, guide, mentor, or communicate in any way with the people who report to you, you are, in essence, teaching.

That's what the 80-percent idea is about, which leaves you 20 percent of your time to accomplish the other tasks that are your responsibility as a service manager….paperwork, and your own learning and development.

There are a lot of things in this segment that, on the surface, might seem to be "over-the-top" in a service environment where technicians are involved. It's normal to think something like…"Well, that might work in some environment with some types of people, but when it comes to technicians…." Baloney. People are people and technicians are people. So, get over the fear (yes I said (FEAR, which I've learned is really nothing more than False Education Appearing Real), suck it up and get started on being an exceptional leader.

Is it possible that you may lose somebody in the process of your either taking or starting over? Yes, it's possible, and I have one thing to say about that. It's been my experience that the person who uses the excuse that you've turned into something they can't stand, or if they don't like the idea that you're the one who's come on board to take charge, all you've really implemented is a process that will eventually unfold anyway. So you might as well allow it to happen and save yourself the aggravation that you know you're going to be dealing with for months, or even years.

Sometimes, we learn this the hard way. I know I did. As a not-too-experienced supervisor, I had an individual who reported to me for a period of time, and while there were times that he did a good job, there were also times that he didn't. The unacceptable performance ranged from minor inconveniences to out-and-out trying to stab me in the back or undermine me. His favorite comment when we discussed things in an attempt to solve situations that arose was "I wouldn't take your job if they gave it to me."

This relationship went on for, as I said, a period of time. And during that time, I was, like most supervisors, incredibly busy and not looking forward to going through the hiring process after terminating this individual's employment. But, I finally had enough and decided that I would have a meeting with him, during which I really had only one piece of information to pass on to him. Here's what I said:

"I need you to understand something. In the event that I should get fired, quit, or move on to another position within the company, there's no way you'll ever be considered for my job." (I made sure I had the backing of upper management before the meeting.)

His comment, of course, was the standard one that he "…wouldn't take my job" under any circumstances. Then, two weeks later, he resigned. And, when I set my mind to finding a replacement for him, it worked out as well as it possibly could have. The negative influence in my department was gone, and in its place was a positive influence. His replacement was with me for years, always did the best job he was capable of, and always had a positive attitude toward any challenges we encountered.

I know that you may tempted to consider my story as nice, but not one that would apply to you in your situation, because it's easy to fall into the trap of believing that it's so hard to find technicians that it seems as though you have to put up with being “held hostage” to a certain extent. No you don’t. First, if you recall the concept of your Reticular Activating System (Segment One), you can understand that “what you expect is what you’re going to get” is just how the world works, and that the first thing you have to do is be open to finding a new technician is be open to the opportunities that are always around you. When you put that together with understanding how to get people to *motivate* themselves to do the best job they can do (I don’t believe we can ever motivate somebody else…all we can do is figure out how to guide them in the right direction so they will decide to motivate themselves), and lead, coach and mentor them, you’ll never be held hostage by someone you would rather give the opportunity to seek success elsewhere.

The bottom line reason this is true is that in an environment where a person has an opportunity to learn, grow and develop as a professional, (and as a result improve their personal life) they won’t be highly motivated to leave, constantly looking for “greener grass” (Yes, RAS works for them if that’s what they want) and leaving you. Perhaps you’ve heard a fellow service manager or service company owner lament about a person that they hired, trained, and paid them as much as they could afford, only to have them leave for “a lousy 25-cents and hour more.”

Well, here’s the news on that situation. No, they didn’t leave for “a lousy 25-cents.” They left because they didn’t feel they way I described in my description of a bottom-line reason a person doesn’t want to leave their job. The service manager who understands how to set the money issue aside…the idea that the only thing that “motivates” people is the amount of money they take home every week….will have the enthusiasm and drive to work at the things we explained in this segment. And having that enthusiasm will give you the necessary energy to adopt you own commitment to excellence as a supervisor.

You can choose to implement your commitment as we described it in Segment One, or modify our example to better suit your needs. Or you can modify it to better suit your anxiety that implementing it exactly the way we described it might be a disaster…don’t worry, once you experience positive feedback from those individuals who are capable of being positive, you can revise your original commitment and make the new version known to them. The point is to implement *something*. And remember, to put it out in writing. If you're not comfortable putting things down on paper, you need to get comfortable with doing so. Effective written communication is one of the key skills in achieving excellence in service management. Here's one way I like to think about management and supervision…consider the idea of your overall approach to it as being a table with four legs:

…One leg is your attitude toward your job and your willingness to commit to excellence.

…One leg of the table is your ability to manage the things you need to manage, such as paperwork or other day-to-day tasks that need to be handled.

…One leg is your ability to lead, teach, counsel, coach and mentor those who report to you.

…One leg is your ability to communicate effectively, not only verbally, but in writing.

What would happen to your table if one of those legs only reached half-way to the floor?

Obviously, your service management table would collapse the moment it really needed to stand on all four legs. It might stand up for a while on three legs, but when a situation arises (and it will) in which all four legs are absolutely necessary, your table will collapse. And in one level of collapse, the after-effects might be relatively minor, something you can, as long as you have the time to invest, can be fixed. But, at a different level of collapse, the after-effects can be a disaster that will take much more than a little extra evening work-time or a meeting with upper management to explain what happened and what you plan to do to fix it.

The point I want to drive home here is that it doesn't make sense to have to put in extra time in order to put out fires or get things back on track if you're also the "upper management" in a service management situation, or to have to take the time to cover yourself and explain to those you report to about a situation that you need to fix. You wouldn't (and couldn't) build a house without a proper foundation. It will collapse. Just like your service management table will collapse without the proper support. Often, we are motivated to focus on the things we consider to be a major issue in accomplishing our personal and professional goals, while considering some things to be less important; those things we say we'll handle when we get "around to it."

If you find yourself stuck in this mode, or if you have someone who reports to you who often say's they'll handle it when they "get around to it", here's one way to get yourself or another person past that place.

Cut a piece of plywood or whatever type of wood you choose into a circle of whatever size you like, as long as you have the space to write "Round Tuit" on it. When you give this, either as a gift to yourself or to someone else, what happens is you (or they) get a Round Tuit, and now you or they can get started on getting that thing you or they wanted to get accomplished as soon as there was time to "get around to it."

So now that you've found a way to get around to it, concentrate on building your communication skills, one of the four legs that are necessary for the firm foundation of your service management table, and keep it from collapsing. In wrapping up here, I want to point out that developing your written skills not only serves you well when it comes to documenting what happens in a counseling session, getting the word out about procedures and what's happening in your department or company, or conducting effective meetings. It also helps you implement and conduct an effective in-house training program, which is the subject of our next segment.

SEGMENT FIVE: IN-HOUSE TRAINING PROGRAMS

A state trooper was traveling along a two-lane highway when he came up behind a slow moving vehicle. Figuring that the car was slowing down to turn off into a driveway, he didn't think much of it. But, the car didn't turn off. It just kept going on and on, very slowly, so the trooper turned on his lights and the car pulled over to the side of the road.

When the trooper approached the driver's window he discovered an elderly lady behind the wheel. "Madam", he said as she gave him her driver's license and proof of insurance, "I stopped you because you were going too slow and creating a traffic hazard."

"I wasn't going too slow," the lady answered. "I was doing the posted speed limit on this highway." She pointed out ahead of her vehicle and said, "See, the speed limit on this highway is seventeen miles per hour."

The state trooper couldn't believe that she could make such a mistake. "Lady," he pointed out in an aggravated tone, "that's not a speed limit sign. That's the highway number sign. This is highway number seventeen!"

At that point in the conversation the trooper takes a closer look at the two ladies in the back seat and notices that they look very frightened. Thinking he is responsible, he says, "Ladies, there's no need to be frightened here. This is just a misunderstanding. I'm not going to arrest your friend. This is just a simple misunderstanding."

"Oh," said the lady behind the wheel, "they're not afraid of you officer. We just came off of highway 119."

It's easy for people to get off track when they're sure they're working with correct information, even when the information is actually wrong. One way to prevent that in an organization that strives for excellence is through the implementation and ongoing operation of an in-house training program. In any service industry, an in-house training program that provides for both the development of technical and soft skills is a necessary component of an organization's commitment to excellence in customer service, whether that organization is large or small.

"Training is not an expense. It's an investment."
Jim Johnson

Whether a technician is as “green” as can be, or they have a decade of experience in performing service work, there is a need for ongoing training and technician development. Often, service managers don’t implement an in-house training program, and they have a variety of explanations, some of which are:

“We’re so busy just keeping up with service calls; I just don’t have the time to put training information together.”

“I don’t always know what I need to do in order to make sure technicians get the information they need.”

Perhaps you’ve heard somebody say something along the lines of the above, or maybe you’ve even said (or at least thought) them yourself. There’s no doubt that getting training accomplished on your own site is a challenge, however, as we all know, it can provide a great deal of benefit for both new and experienced technicians. Often, service organizations struggle with the task of keeping technicians up-to-date, and with bringing along new technicians, not because they aren’t sure *what* information to provide, but *how* to get it accomplished. There are some of the basic things that are fundamental to establishing an in-house technician development program.

The first thing we’ll consider is a simple philosophy because of one more quote you might hear from a service manager or service company owner about providing training…”I’m a technician, not an instructor.”

Well, that’s likely very true in almost all cases of any service organization. So, we’ll start off by saying, OK, we agree that you’re not an instructor, and also make it clear that you don’t have to be formally trained in teaching technical or non-technical subjects when conducting a training session. What you can be is a facilitator.

What’s the difference? A facilitator is someone who gathers the information that will be passed on to those attending a training session, and presents that information in a manner that fits their style best, along with understanding some basic rules about coordinating and conducting a training session.

Rule 1: Know that you *can* do this.

Realize that an “instructor” has often already prepared the things you need to conduct an effective in-house training session, and the information is available to you in the form of a service manual, or possibly a DVD prepared by an equipment manufacturer on a given subject. (By the way, using a DVD doesn’t mean you just pop it into the player and let it run. As a facilitator, you still need to be the on-site contributor to the training session.)

Rule 2: Always completely review every element of the resource material you gather.

That means more then just taking the time to read the manual carefully or view the DVD. It means figuring out how you can modify the information for maximum benefit to your particular needs, and how you will add to it to make the training session your own.

Rule 3: Remember that attitudes are not taught, they’re caught.

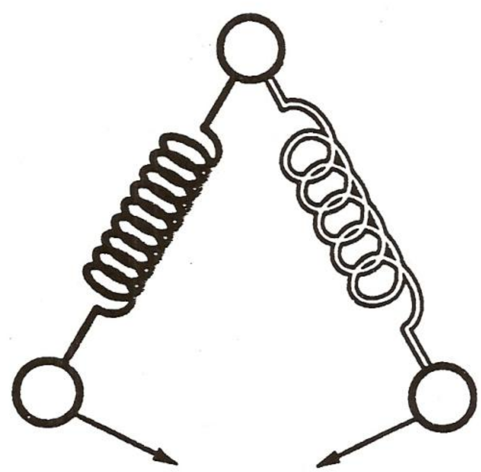
Simply put, if the technicians in your organization are going to look upon regularly scheduled in-house training sessions as important and beneficial, and not time-wasting, boring events that take time away from doing their job and/or making money, they’re first going to have to understand that you consider training sessions and important and beneficial. Fostering this attitude begins with putting it in writing. Make sure each technician who is supposed to attend the training gets the information in writing about the time and topic of an upcoming session. So make it “official”…put it in writing.

The next step, and it’s an important one, is to decide how to make the session an interactive one for the technician, with you in the driver’s seat. To gain a full understanding of this concept, consider this example: You have a relatively new-to-the-business technician, and you’re planning a session on troubleshooting on compressors, and note the following illustration.

REFRIGERATION COMPRESSORS AND START COMPONENTS
PART ONE

Major appliance refrigeration compressors range from simple, standard models that use current relays, to PTC relays the provide a PSC operation of a compressor, and on to variable speed compressors that use an electronic control system to slow down and speed up in accordance with the heat load. Understanding this variety of compressors begins with understanding the fundamental electrical characteristics of compressors.

In some standard compressors that use a current relay as the start device, the resistance measurement of the windings will be dramatically different. The fundamental concept to understand is that the start winding will have higher resistance than the run winding.



(Figure One)

This is a page out of one of the important elements of your interactive training session…a technician workbook. Notice the text here. It's simple, straightforward, and isn't what you would call "textbook" or "academic" stuff. And, it leads into our next illustration.

This drawing this is incomplete until the technician, on a cue from you, makes it complete. In this illustration is the second important element. It's a carbon copy (almost) of the technician's workbook page.

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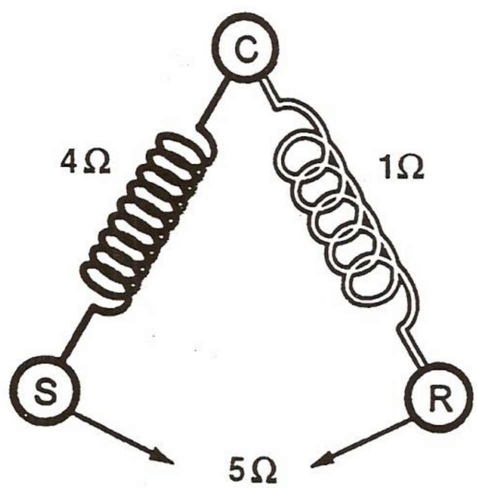


(Figure Two)

What you'll notice here is that the text is the same and the drawing of the motor windings is the same, except in this illustration, the Common, Start and Run terminals on the schematic symbol are there to identify the wiring connections, and there is also information on the resistance readings of this particular compressor's start and run windings. This is your copy, which means that the technician's copy won't have the information shown here until you provide it for them. And, how do you convey this information to those attending the training session? There are a couple of methods you can employ.

The most state-of-the-art (and the method that requires the most investment) involves using PowerPoint after developing your information with a word processing program and using a scanner to integrate any necessary illustrations that are simply photocopied from manuals, tech sheets, or even just from a schematic diagram into the document. In addition to the PowerPoint software program, you'll need a laptop and a projector in order to show your information on a screen or wall, and then direct those attending your session to complete their workbooks.

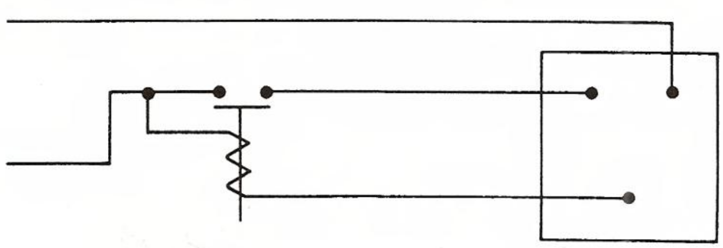
While a scanner is less than a $100 investment, a projector can be a more significant expense. You could spend a lot less by employing a standard overhead projector (about $150) and making your copy of the information on transparency material that can be run through your standard office copier. The point to remember here is that, certainly it is quite an investment in time and money in order to present information in this manner, but the interactive method of conveying information in a training session is extremely effective in helping technicians get a handle on the fundamental concepts they need to learn, as well as master new, updated information and procedures as it comes along.

Our next illustration (Figure Three) is part of another page from the technician's workbook, a simplified diagram of a compressor and current relay. Note again that there is information missing from the page, not only on the illustration, but key terms are missing.

When a current relay is used to operate a compressor:

The relay contacts are wired in series with the ___________________ winding.

The relay coil is wired in series with the ________________________ winding.



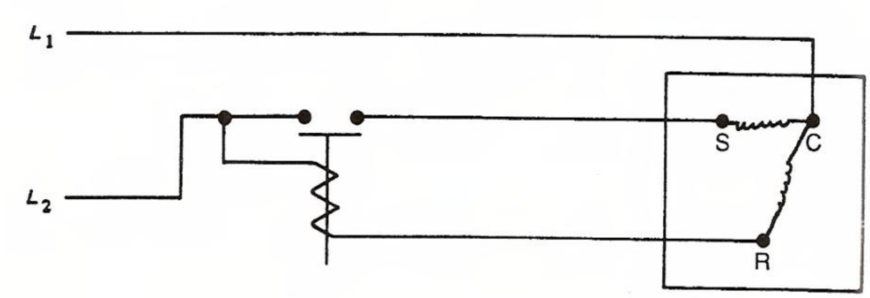
(Figure Three)

In the next illustration, Figure Four, part of the page from *your copy* of the technician's workbook, the information you are going to provide in order to drive home a complete understanding of the concept being presented is there.

When a current relay is used to operate a compressor:

The relay contacts are wired in series with the start winding.

The relay coil is wired in series with the run winding.



(Figure Four)

This concept of an interactive training session can be applied whether it's fundamental concepts that are being presented or more advanced information on specific troubleshooting and test procedures.

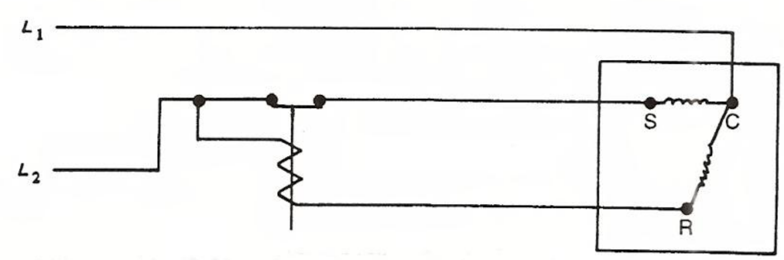
For example, consider that your ultimate goal is to conduct a session on variable speed compressors. OK, so far, so good….the specific topic of your session is how a variable speed compressor works, and what steps a technician needs to take in order to evaluate and troubleshoot one. Do you just go straight into the theory of operation and the specifics on test procedures related to this new process?

Probably not.

One of the fundamental factors to remember about the adult education process (that is, after all, what you're dealing with when you're facilitating and in-house training session: adult education) is that adults learn best when they can "partner-up" the new information with something they already have a good understanding of. So, if you're introducing new technology related to the operation of compressors, for example, you can lay the foundation for that ultimate information by making a review of standard compressors and start devices part of the session. A review helps to remind an experienced technician of something they learned about in the past, and at the same time, allows some breathing room for the less experienced technician, making them more comfortable about the prospect of having to learn something new. One way to accomplish this is by reviewing the fundamentals of compressor motor windings, and while you're at it, find a way to stimulate some discussion on the subject of compressor motors and how they operate. Our next illustration, Figure Five, shows you one way to accomplish this.

The current relay is also often referred to as an:

____________________________________ relay since the strength of the magnetic field of the coil is determined by the current draw of the run winding. At the instant of start, the LRA of the compressor causes a strong magnetic field that forces the relay contacts closed.



(Figure Five)

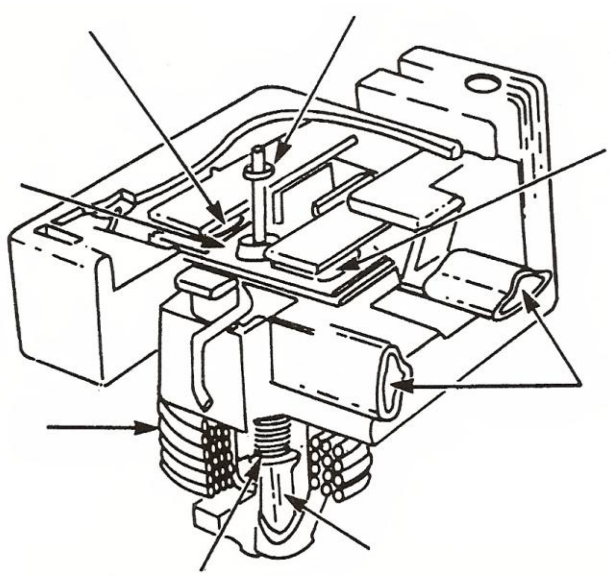
Here, we're still accomplishing that interactive goal we discussed previously, and we also want to focus on another element. First, there's the idea of the interactive process in which the blank you see in the text needs to be filled in with the term "Amperage". As you'll also note in the text, there is a reference to "At the instant of start, the LRA of the compressor causes a strong magnetic field that forces the relay contacts closed."

Your goal in presenting the information in this format is to stimulate a discussion, or, if a technician-in-training is brave enough, even generate a question that you will be prepared to answer. Note the term "LRA" in the sentence….. "Locked Rotor Amps" is the definition that applies here, and it's a good bet that it's universally understood by experienced technicians that that's what "LRA" stands for. In that case, give that technician an opportunity to participate in the session and clarify that information. And, if another technician in the session isn't sure what it means, but is uncomfortable about asking because they "don't want to look stupid", then you've just accomplished two things by allowing the experienced tech to contribute and explain what "LRA" means.

First, the experienced tech will feel more involved in the training session and won't be bored with a fundamentals review since they had an opportunity to contribute, and the less-experienced tech learns something new without having to muster up the courage to come right out and ask.

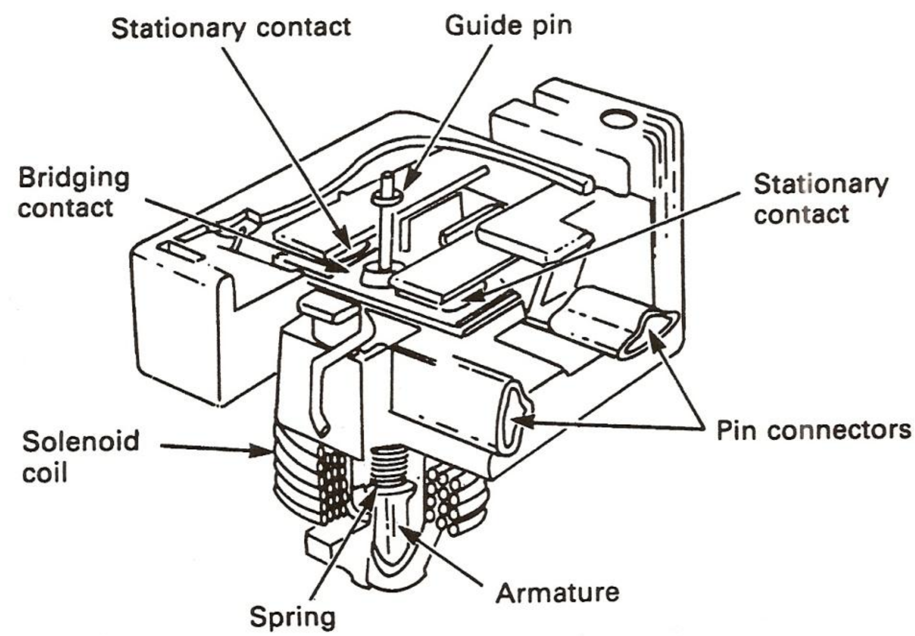
Remember, a major aspect of a successful in-house training program is to allow your experienced technicians the opportunity to "strut their stuff" during a session. It's not only an integral element to team-building within your organization; it also gives the individuals who can contribute to the success of the session a great deal of satisfaction.

And, as you progress toward your goal of presenting information on variable-speed compressor operation, your overview of a standard compressor's operation and related start components will give those attending your session more information to use as a bridge to understanding the new concept. (See our Figure Six.)



(Figure Six)

The goal of this illustration and the upcoming interactive facilitation on your part is to, again, present a detailed review of the concept of a compressor's operation and lay the groundwork for being able to integrate the new information that will culminate the training session. Our next illustration, Figure Seven, shows you what information the training session attendees will be completing at your direction.

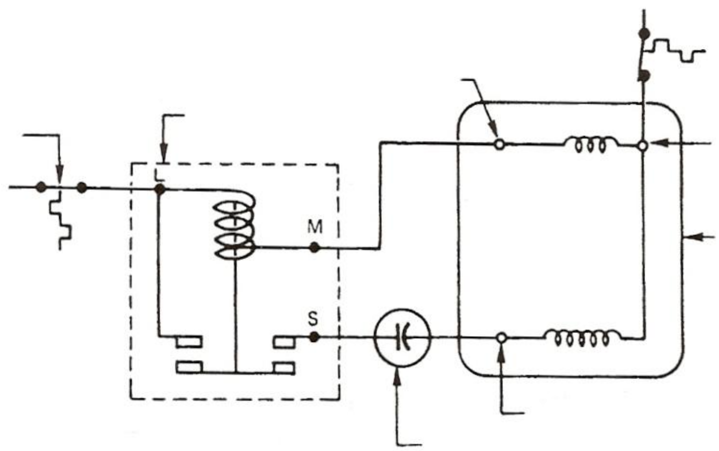


(Figure Seven)

When you review this illustration, you can understand the need for allowing for plenty of white space around the drawings you show on the page from the technician's workbook. Even though your copy may have the printed information, when a technician fills in the missing information in their book, they'll need the necessary room to hand write things in.

With the information overview on current relays accomplished, you can move on to the next stage of review, which would include introducing a more detailed wiring diagram relative to compressor starting and running, and also adding information on start capacitors. (See the next drawing in Figure Eight)

In addition to an overload protector, the current relay may be used along with a start capacitor to provide a boost at the instant of start.



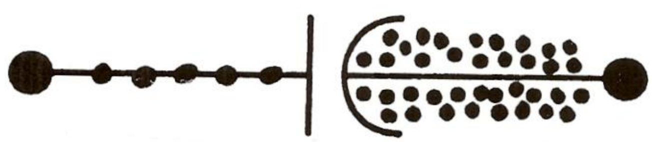
When troubleshooting a compressor that won't start, always isolate the relay and start capacitor for testing before condemning the compressor.

When testing from ____ to _____ on the relay, your ohmmeter should show resistance.

When testing from ____ to _____ on the relay, your ohmmeter should show infinity with the relay in the upright position.

It is common to find a start capacitor rated at _____ to _______ microfarads used with refrigerator and freezer compressors.

The fundamental concept behind a start capacitor is that is stores electrons, then lets them go in a rush to provide the extra boost in the strength of the start winding's electromagnetic field.



(Figure Eight)

In this segment of the training session, the technician will not only have blank text information to be completed, but will also have to accomplish identifying the factors on the wiring diagram. Keep in mind that you can direct them through this process in one of two ways. One is to make a transparency of the page from the technician workbook, then use a wet-erase marker to fill in the missing information “on the fly” as you discuss the components and factors. The other way is to have the information already printed on a second copy of the technician’s workbook, such as we’re showing in our next illustration in Figure Nine.

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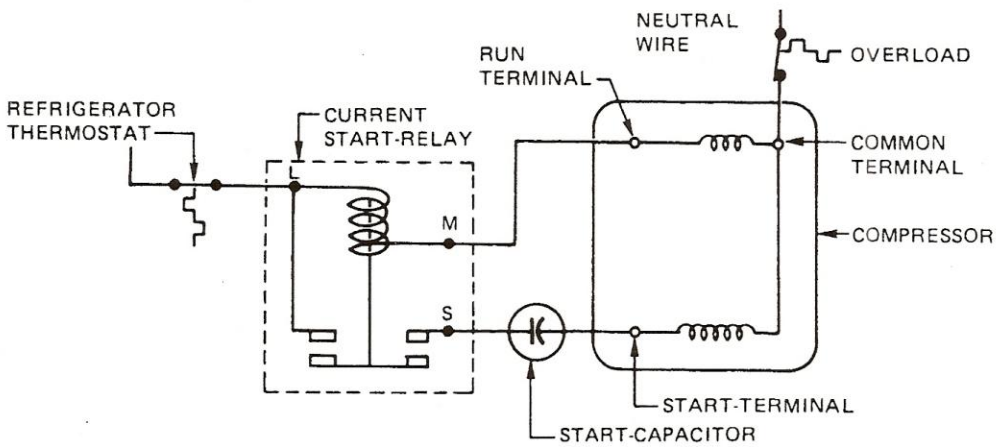


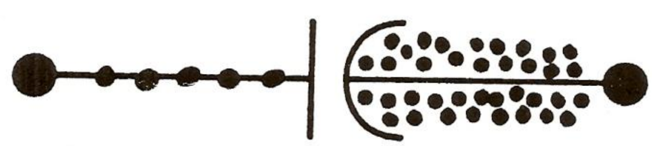
When troubleshooting a compressor that won’t start, always isolate the relay and start capacitor for testing before condemning the compressor.

When testing from L to M on the relay, your ohmmeter should show resistance.

When testing from L to S on the relay, your ohmmeter should show infinity with the relay in the upright position.

It is common to find a start capacitor rated at 88 to 108 microfarads used with refrigerator and freezer compressors.

The fundamental concept behind a start capacitor is that is stores electrons, then lets them go in a rush to provide the extra boost in the strength of the start winding’s electromagnetic field.

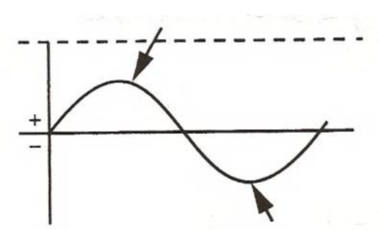


(Figure Nine)

Once you’ve reached this stage in the training session, your attendees will be ready to move on to the next subject that will lead up to the understanding of variable-speed compressors, which is comparing them to the operation of a PSC compressor that employs a solid state start device.

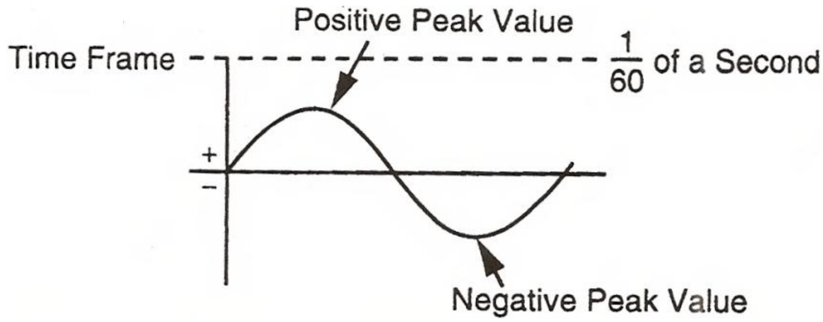
One of the elements of understanding variable speed compressors is method in which the current flow through the compressor motor windings is delivered via the electronic control system of the refrigerator. That being the case, an element of set-up for this specific session would include a simple explanation of alternating current. There is actually a two-fold purpose in this element of the session. First, as you recall, you've presented information on the fundamentals of standard compressors and start devices. As you continue with your set-up, you can introduce the necessary information on the fundamentals of alternating current to accomplish two things. One is to continue with a review of known information (PSC compressor motor operation and PTC relays), then apply that information to the operation of a variable speed compressor.

From the facilitator's perspective, a review of alternating current can be accomplished in minutes with an illustration of a simple sine wave. In Figure Ten, we're showing an example of this as it would appear in the Technician's Workbook.



(Figure Ten)

In keeping with the interactive philosophy of effective in-house training programs, you'll note that there is an opportunity in this illustration for the facilitator to clarify what this drawing is explaining. With an overview of alternating current understood and applied to the operation of a PSC and PTC compressor operating system, the stage is set for understanding how an electronic control system applied to a variable speed compressor both monitors, then slows down and speeds up the compressor. Figure Eleven shows you the facilitator's version of the same illustration.



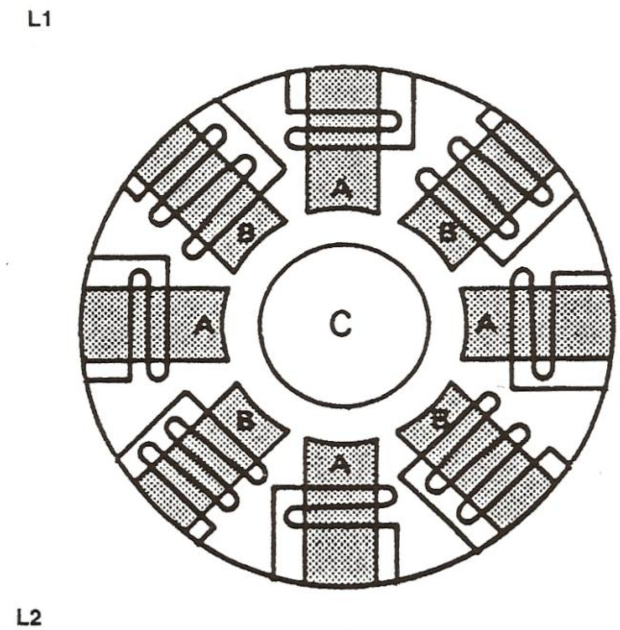
(Figure Eleven)

As always, the facilitator has the option of using this print version as it is shown when using PowerPoint, or if you prefer to use an overhead projector and employ an “on-the-fly” method of conveying information, you could show the technician version on a transparency, and then provide the missing factors using a wet-erase marker. This is one of the factors to consider about making your in-house training sessions as effective as possible.

If you as the facilitator are comfortable with computers and PowerPoint presentations, then follow that route. If you’re more comfortable with a slower pace of delivering information and doing it by hand rather than making use of slides and pre-printed fill-in-the-blank information, then use the overhead projector system.

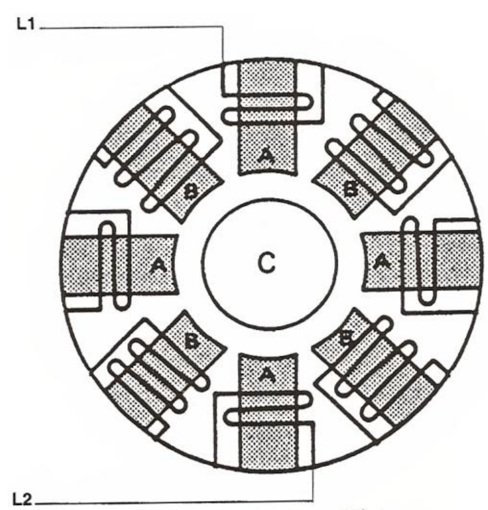
Whatever process you choose to employ, your task at this point in this particular training session is to remind, review, or convey new information relative to the fundamental factors of alternating current…that in the United States, alternating current is generated at 60 Hertz (abbreviated as 60 Hz on equipment tags), which translates to 60 cycles per second. And, within this process, since alternating current is generated by cutting the lines of force of a magnet with a conductor, there will be what is known as a Positive Peak Value and a Negative Peak Value (the poles of magnets being North and South) when the generator rotates in a timing of 1/60th of a second. (You could mention, of course, that in other countries, generating systems operate at 50 Hertz rather than 60 as in the U.S.) The other factor to point out is that, in simple terms, the generation of alternating current is described as being a phase, and that the job of the run capacitor in a PSC motor circuit is to split the phase. And this brings you to the next set of drawings to employ in this session on variable speed compressors, the first of which is shown in Figure Twelve.

In a PSC motor circuit, current flows uninterrupted through the run winding of the compressor.



(Figure Twelve)

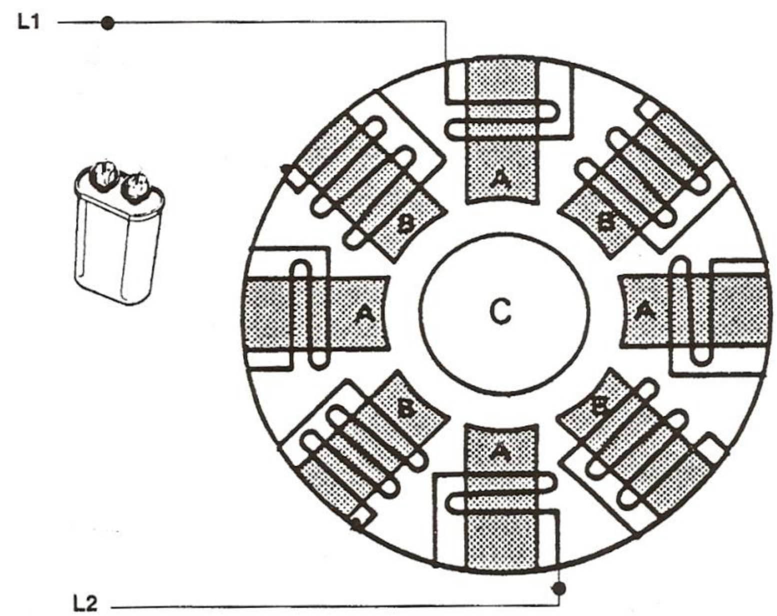
Using this illustration gives you the opportunity to quickly and easily present information on a motor that you will show employing a PSC operating system. This drawing, which is the technician's version in their workbook, has some information on it….the identifiers that show the run windings of the motor as "A", the start windings as "B" and the rotor of the motor as "C", but you will still be providing the necessary information for the wiring of a such a motor operation, as we're showing in the subsequent drawings. (See Figure Thirteen)



(Figure Thirteen)

This drawing, from the Facilitator's Guide, shows that in a PSC motor circuit, L1 and L2 are connected directly to the run windings of the motor. This leads you into the next step in explaining how a PTC relay and run capacitor system is employed in refrigerator and freezer compressors, which is the next drawing (shown in Figure Fourteen) from the Technician's Workbook, shows what you are about to explain about how a run capacitor is wired in series with the start winding of the motor.

However, since the run capacitor is wired in series with the start winding, the electromagnetic field of that winding is slightly out of sync with the electromagnetic field of the run winding, and the end result is that the motor operates more efficiently.



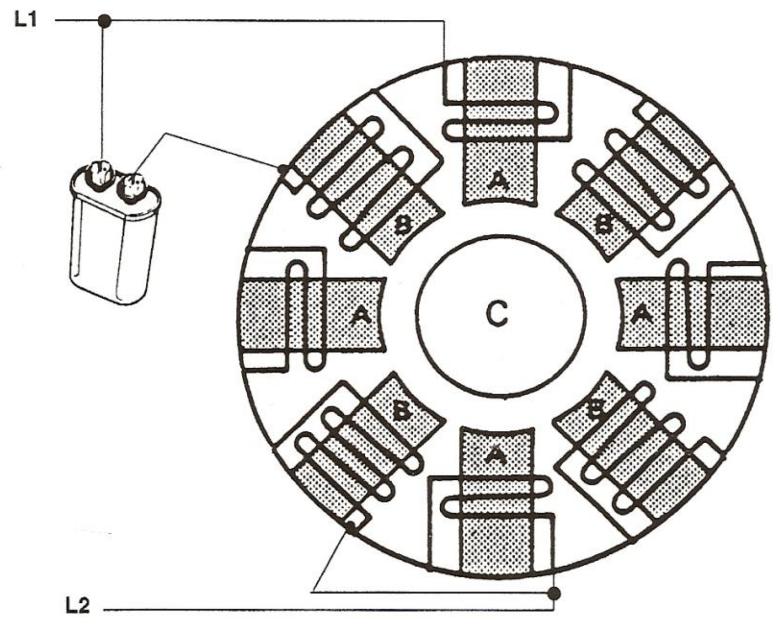
(Figure Fourteen)

This illustration, which picks up where you left off with the wiring connected only to the run windings of the motor, also shows the run capacitor you are about to interactively explain in the next illustration from the Facilitator's Guide, which is shown in Figure Fifteen.

With this drawing displayed in either a PowerPoint format or on a transparency, and whether or not you use a printed version or simply a transparency copy of the illustration from the Technician's

Workbook, what you're accomplishing here is more than just showing the wiring connections of a PSC motor.

However, since the run capacitor is wired in series with the start winding, the electromagnetic field of that winding is slightly out of sync with the electromagnetic field of the run winding, and the end result is that the motor operates more efficiently.

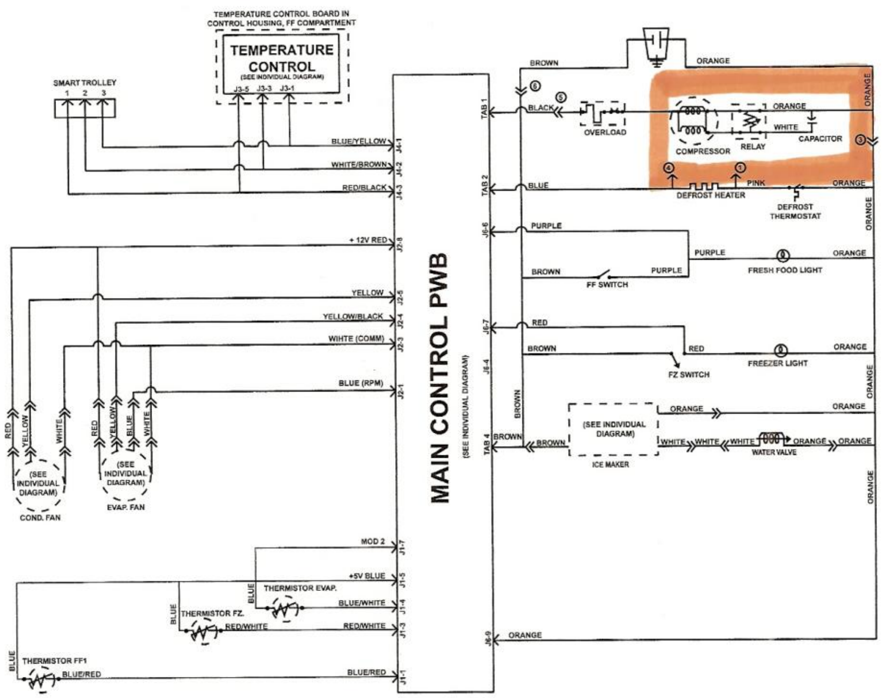


(Figure Fifteen)

Extensive studies in adult education in both the academic and voc-ed areas show that when a method such as this is employed in providing training, the retention of the person on the receiving end of the information goes up dramatically. Without a visual aid system, and an interactive process on the part of the student, retention of information presented at a "talking head" session is approximately 10%, seven days after the training session.

"The best way to teach is through the eye and the hand. It is hard to retain what we hear, but a man remembers what he sees and does."
John Patterson (1913)

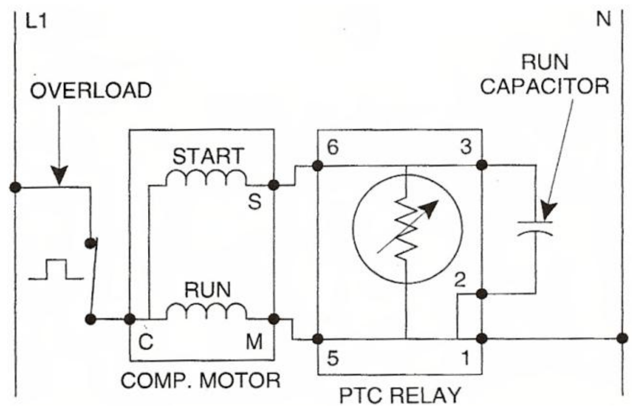
However, when a visual aids and an interactive system is employed, retention rates are measured at 80% after seven days. And there are several ways you can employ the interactive and visual process. For example, in addition to the drawings you use to illustrate and explain the fundamental factors relative to PSC/PTC compressor start/run systems, you could use a manufacturer's schematic diagram, highlighting and isolating the area in which the topic you are explaining applies. Figure Sixteen shows you how this would look in your final presentation PowerPoint slide or transparency if you decided to add this element to your presentation.



(Figure Sixteen)

The additional benefit to taking this step in your in-house training sessions is that it gives the technicians attending your workshop a real place to put the information and processes they're learning about. It also has the added benefit of reviewing and, if necessary, improving schematic diagram reading skills, an underpinning of accomplishing electrical troubleshooting. You could also employ other isolated schematics of the topic at hand, such as the one we're showing in Figure Seventeen.

Once you're this far into the training session, you could decide to have both the Technician's Workbook and Facilitator's Workbook contain the same information if you wanted to pick up the pace of the session somewhat, or you could decide to again employ the idea of a fill-in information approach for the Technicians' Workbook. It's up to you, after all, since you're designing the training sessions to best suit both yourself and the technicians attending the workshop.



(Figure Seventeen)

Whatever approach you decide to take relative to the schematics you use in conjunction with a particular training segment, you could use a highlighter to trace the circuits that exist when the PTC is functioning at the beginning of the starting mode, then use a second copy to show the circuit when the motor is up and running. All of which would add to the training experience that ultimately leads to the understanding of variable speed compressors.

The point of our going through a step-by-step approach is to show that no matter what your industry (major appliance service, HVACR, plumbing, electrical, automotive, or whatever) there is always information available from equipment manufacturers, and you can draw the content of your in-house training program from things like service manuals or product information sheets.

Jim's Notes On Segment Five….

In a public square in Florence, Italy stands a marble statue that is known worldwide as a masterpiece. It's Michelangelo's David. Well, not the *real* David. The sculpture that tourists visit in droves every day in the public square is not the original. It's an exact copy that was accomplished via laser technology. Italian officials wanted to preserve the tradition of the statue being in its original position, where Michelangelo intended it to be… enjoyed in the open, surrounded by the buildings in the square. The original statue is on display in a museum nearby, and the wait to get in to view it is usually about 4 hours. When you see either one, whether or not you are an art lover, you are amazed by Michelangelo's accomplishment. You are in awe of his skill as a sculptor. And of course, Michelangelo, in his lifetime, accomplished much more than just the statue of David….the ceiling of the Sistine Chapel at the Vatican is just one more example of his skill as an artist.

Despite all of his obvious skills, and all the statues and paintings he was able to produce in his lifetime, though, Michelangelo always considered himself to be a student of art. At the age of 87, he was quoted as saying "Ancora imparo"……"Still, I learn."

Every year, Refrigeration & Air Conditioning News, one of the premier publications for the HVACR industry, conducts a contest to pick the best contractors to work for. And there are categories related to company size, so smaller companies are on a level playing field while competing for the honor. And each year, when the top companies are chosen in all the categories, whether a large company or a small one, there is one common thread that runs through each of them. They all have an effective in-house training program.

Sure, some of the company profiles include things like reasonable wages or other compensation programs, benefits related to health care, and reward programs for employees. Not all of them have the same type and range of benefits, but, like I said, the one common thread that runs through each of their company profiles is an in-house training program that works.

The example I've mentioned is from the HVACR industry, but it could be any industry that employs service technicians. The fundamental idea behind providing in-house training so that employees feel as though they have an opportunity for professional and personal development fits anywhere. As I've said previously… people are people.

If you're not fully comfortable with facilitating an in-house training session, do something incredibly simple: Sign up for a workshop on any subject that interests you, and while you're attending, pay close attention to the presenter. What do they do to put people at ease? What type of visual aids do they use to make sure their point is understood? When you watch them from the perspective of understanding how the present information as well as what the information is, you'll gain a great deal of insight on how to conduct a session on your own.

If you feel the need to take things slowly, you can gain some experience in conducting an effective meeting and developing your public-speaking skills through that process.

The point is, just like the importance of developing your written communication skills as I mentioned in the last segment, the ability to direct an in-house training program is a key to your success as a service managers. Of course, none of what we've discussed relative to having the time and resources to implement an in-house training program is meaningful if you don't have the funds to get it off the ground and keep in running. Yes, you need money to achieve excellence in your company. And there are two things that help you gather the necessary funds to operate at a higher-than-average level. One, is implementing a flat rate pricing program into your business, and the other is operating your business according to a formal mission statement, two subjects we'll address in the final segment.

SEGMENT SIX: FLAT RATE PRICING & MISSION STATEMENTS

A man went into a stable to buy a bale of hay.
"How much for a bale of hay," he asked the proprietor.
"Eight dollars," was the reply.
"Eight Dollars!" the man exclaimed. "Don't you have any hay that's cheaper than that?"
"Well, yes I do," said the proprietor. "I have some hay that's only three dollars a bale."
"Now you're talking," said the man. "I would like a three-dollar bale of hay."
"Well," said the proprietor, "I don't have any three-dollar hay available at the moment, and I'm not sure when it will be ready."
"Why is that?" the man asked suspiciously.
"Because I have to wait until that horse over there is finished with an eight-dollar bale before I can deliver a three-dollar bale to you

A service organization that provides the best possible service to its customers is entitled to a fair price for their services, and they are also entitled to earn an honest profit in the process of delivering those goods and services. And the most effective way for a service organization to accomplish that goal is to use a flat-rate pricing system that fits their business.

Flat rate pricing makes the most sense for any service organization. We encounter flat rate pricing when we have our automobile serviced. When a customer calls a plumber for service, a flat rate price system lets them know how much they'll be paying for labor to get the job done. Electricians do flat rate. Many HVACR service companies use flat rate pricing. And, a fair percentage of appliance service companies use some type of flat rate price system. And flat rate is not only the best type of pricing system for the service organization, it is the fairest for the customer.

Often, it's assumed that a service organization will wind up losing business or hearing a lot of complaints if they went flat rate because of the myth that it means raising prices to level that customers won't tolerate. While it's often the case that when a flat rate pricing system is implemented, rates will go up, that doesn't mean that customers are being ripped off. It only means that professional rates are being charged for professional services.

"The better the service, the less price becomes an issue."
John R. Dijulius III

And here's a comment that you might hear from somebody who isn't interested in going flat rate….. "Well, flat rate might work for you, but you don't know what *my* customers are like!"

Baloney. It doesn't matter whether you're in Los Angeles, California or Spackle Junction, Arkansas. Flat rate works for any size service organization in any market when customers (not price-shoppers) are the focus of a service business. If you've considered flat rate but haven't done it yet, find an on-line discussion board to visit and solicit an opinion from somebody who isn't in your immediate market area.

The point is, you don't have to take our word for it. Talk to others and get their opinion. What you'll likely hear from them is that while they may have had some concerns about going flat rate, the exact opposite is what actually happened. Instead of customer complaints about price going up, they went down. The phone didn't stop ringing. Instead of a revenue decrease, there was an increase, and with the revenue stream refined and improved, planning for capital expenditures such as new vehicles became a reality, along with resources to offer employee benefits, and implement in-house training programs.

Historically, the opportunity for a higher pay scale and benefits for technicians and other employees becomes a possibility instead of a bone of contention or a pipe dream. What this boils down to is that in an industry that's experiencing harmony, the young people who are needed to replace those who are retiring will see an opportunity for a professional career, not just a job for the moment. The bottom line is that if a service organization employs the flat rate pricing system that's right for them, and it is implemented effectively, everybody benefits.

And there are several ways to go when implementing flat rate into your business. One is to purchase a complete system that is available in a variety of formats. Another way is to design your own.

A company-designed flat rate price guide can be as simple as a few pages, or one that implements a simple concept of categorizing jobs from the very simple to the most difficult and pricing them accordingly. Still another way to approach the concept of going flat rate is to implement a “hybrid” system in which you use a package system, tailoring it or modifying it to be a better fit for your organization.

Whatever approach you take, understanding what your cost of doing business is will ensure your success in implementing a flat rate pricing system. Determining your true cost of doing business involves understanding all of your overhead costs and, often, using all available records for at least a full year, incorporating a series of P&L (Profit & Loss) statements. If you need help in this area, consult with an accountant or look into resources that are available through industry trade associations.

One way to calculate your hourly labor rate is to consider five factors:

1. Overhead Ratio

2. Average Daily Wage

3. Average Daily Total Cost Burden

4. Total Daily Productive Hours

5. Percentage Profit Goal Average

OVERHEAD RATIO

A first step is to determining your overhead ratio is to decide how long a time period you wish to use for your calculations. You should use at least 3-6 months, but a year’s records will give you better accuracy. For the length of time selected, add together all expenses <u>except</u> technical payroll and any expenses that are incurred for parts only. These expenses are defined as your total overhead expense. These include:

1. Office payroll cost, including your own salary if you are self-employed but not a technician. (If you are also a technician, the technical part of your salary needs to be added to the technical payroll.) Be sure to include a salary for your spouse, or any other family members that work in the office. Also under this listing, be sure to include all payroll taxes paid out for technical and office personnel.
2. ..... Rent or mortgage payments.
3. ..... Utilities including phone, water sewer, gas, electric, and garbage.
4. ..... Insurance, including liability, auto, unemployment, health, property, employee, and Workers' Compensation.
5. ..... Automobile expenses such as gas, oil, tires, car washes, maintenance, and repairs, and of course, any vehicle payments. If your vehicle is also used for personal use, check with your accountant to know what portion to deduct.
6. ..... Advertising, including all print, radio and TV ads and promotions, vehicle painting, printing, postage, signs, etc.
7. ..... Office equipment and supplies.
8. ..... Answering service, radios, cellular phones, etc.
9. Educational materials such as magazine or newspaper subscriptions, videos, books, microfiche, and service manuals.
10. ... Memberships to professional organizations.
11. ... Tools, technical equipment and uniform costs.
12. ....Travel and entertainment.

Anything relating to parts should only be used in your calculation of your parts markup because parts are inventory. And the revenue generated from inventory sales should be calculated separately so as not to confuse the revenue issue, which often leads to under-pricing labor prices.

AVERAGE DAILY WAGE

To calculate your technical payroll and use that figure to understand your overhead ratio, you need to understand Average Daily Wage. Once your average daily wage and your total technical payroll are understood, your total overhead expense is divided by this figure in order to give you your overhead ratio.

Example: If your total overhead expense for the period was $29,100 and technical payroll for the period was $19,400, your overhead ratio is 1.5. This means that for every $1 paid to technicians, an additional $1.50 is paid out for overhead costs.

$$\$29,100 \div \$19,400 = 1.5$$

In many situations, an independent HVACR service company is a one or two-person operation, with the proprietor running the service calls (and the proprietor's partner answering the phone). In these cases, the average daily wage calculation is often overlooked because there are no other technical employees to consider. However, if the proprietor/technician setup is what describes your HVACR service operation, designing a system to pay yourself and then using that figure to calculate costs is something your should consider. It’s an effective way to have an overall understanding of your cost of doing business, and, if you grow your company and hire technicians, the system allows you to track individual technician costs effectively.

To calculate average daily wages paid to technicians, whether it’s yourself or someone else, first determine how many hours each technician works on an average day, then divide the number of hours worked by the number of days worked in that time period for each technician.

Example: In a three-month period, Technician #1 worked 627 hours in 75 days. The average number of hours he worked each day is 8.36.

$$627 \div 75 = 8.36$$

In the same three-month period, Technician #2 worked 600 hours in 70 days, averaging 8.57 hours each day.

$$600 \div 70 = 8.57$$

Once you have the average number of hours worked daily, you have to calculate the average daily individual wage. Multiply the average number of hours worked daily by the hourly rate of each technician.

Example: Technician #1 is paid $22.00 per hour, while Technician #2 is paid $16.00 per hour.

$22.00 X 8.36 = $183.92 average daily wages for Technician #1

$16.00 X 8.57 = $137.12 average daily wages for Technician #2

If you have employees who are paid overtime for extra hours, you need to calculate the overtime hours separately from the regular hours. Take the number of hours worked in this time period at regular pay and divide it by the number of days worked. Then take the number of hours-worked overtime in the same time period and divide it by the same number of days. Multiply each figure by the appropriate hourly wage.

Example: Technician #3 worked 520 regular hours and 100 overtime hours in 65 days.

520 hours regular wages ÷ 65 = 8 hours regular pay each day average

100 hours overtime wages ÷ 65 = 1.54 hours overtime pay each day average

Multiply the average number of hours each day at each rate. If technician #3 is paid $22.00 for each regular hour and $33.00 for each overtime hour…

$22.00 X 8 = $176.00 average daily regular wages

$33.00 X 1.54 = $50.82 average daily overtime wages

Add the average daily individual wage (including overtime pay if necessary) for each technician and divide by the number of technicians. This will give you the average daily wage.

$183.92 average daily wages for Technician #1

+$137.12 average daily wages for Technician #2

+$176.00 average daily regular wages for Technician #3

+$ 50.82 average daily overtime wages for Technician #3

$547.86 average total daily technicians wages

÷3 technicians

$182.62 is your average daily wage

AVERAGE DAILY TOTAL COST BURDEN

With the information gathered so far, you can calculate the average daily cost burden of your business. To accomplish this, first multiply the average daily wage by the overhead ration to calculate an average daily cost burden. Then add the average daily wage to get the average daily total burden.

Example: The average daily wage is $182.62, and the overhead ratio is 1.5

$182.62 Average daily wage
X 1.5 Overhead ratio
$273.93 Average Daily Cost Burden
+$182.62 Average daily wage
$456.55 Average Daily Total Burden

The average daily total burden is your break-even point. If you equal your average daily total burden per technician in labor charges to customers, you will break even on labor. And, with the next concept, Average and Total Daily Productive Hours, understood, you can establish an hourly rate

AVERAGE AND TOTAL DAILY PRODUCTIVE HOURS

Some studies have shown that less than 65% of the average technician's 8-hour day is spent actually performing service work. This isn't to say that technicians are a lazy lot, it's just that there are a lot of other things they have to handle (paperwork, etc…) in the course of accomplishing repairs. To compute the productive-time ratio for a technician, calculate the actual time working on repairs and compare that time to the total hours paid to that technician over the same period.

Example: In a three-month period, Technician #1 worked 627 hours over 75 days. He spent 135 hours doing paperwork and 492 hours generating service income, for an average of 8.36 hours each day.

627 paid work hours
<u>-135</u> hours doing paperwork
492 hours generating service income

492 hours generating service income
<u>÷627</u> total hours paid
.78 or 78% Productive-time Ratio

627 total hours paid
<u>÷ 75</u> days
8.36 daily hours
<u>x.78</u> Productive-time Ratio
6.52 Daily Productive Hours

With this figure understood, the next thing you need to factor in is the fee for your service call and diagnostic services. The most effective way to use a flat-rate pricing system and communicate with a customer at the time they call for service and inquire about price is to let them know that your service call and diagnostic fee is $____, and that once the diagnostic is accomplished, you can advise them on the total cost of the repair. When you use a service call and diagnostic fee, you can deduct any travel time from the total hours you paid to the technician. This will give you a higher productive-time ratio.

Example: Over a three-month time frame, Technician #1 spent 30 hours doing paperwork and 30 hours traveling to service calls and was paid for 600 hours over 70 days in that time period.

600 hours paid
- 60 hours doing paperwork
<u>- 150</u> hours travel time
390 hours generating service income

390 hours generating service income
<u>÷600</u> total paid hours
.65 or 65% is your real Productive-Time Ratio

Which leads you to calculate:

600 total paid hours
<u>÷70</u>   days
8.57 hours work daily
<u>x.65</u> productive-time ratio
5.57   as the real Daily Productive Hours of Technician #1.

PERCENTAGE OF LABOR PROFIT AND YOUR HOURLY RATE

Now, with all things considered, you can determine the hourly rate you want to plug into your Flat Rate Pricing System.

Take your average daily total burden and divide it by your average daily productive hours to figure your overhead burden per hour.

Then, multiply the overhead burden per hour by your labor profit goal percentage. This calculates your profit goal burden.

Add the overhead burden per hour to the profit goal burden to calculate what your hourly rate needs to be in order to earn the profit percentage you've set for your business.

Example: You have a daily total burden of $380.85, with 5.57 average daily productive hours, and a profit goal of 10%.

$319.91 daily total burden
<u>÷   5.57</u> daily productive hours
$ 57.43   overhead burden per hour (rounded off to nearest dollar)

$ 57.43   overhead burden per hour
<u>X   10%</u> profit goal percentage
$ 5.74   profit goal burden

$ 57.43   overhead burden per hour
<u>+ $5.74</u>   profit goal burden
$ 64.00   per hour labor charge (rounded up to the next dollar)

With this calculation accomplished, divide the per hour labor charge by 6 to get the 10 minute rate that you will to use as a basis to calculate the final number you'll plug into the your flat rate pricing system. If the amount is not an even dollar, round it up to the next even dollar amount.

$64.00÷6=$10.60 rounded up to nearest dollar…$11.00

Once you've determined what your 10-minute rate is, your next step is to determine how much time you're going to allot to a given job. If it's 30 minutes, then our example would take us to a $33-dollar price. If it's 40 minutes, your labor price, in addition to your service call and diagnostic fee, any parts and supplies, and tax, would be $44. So, when using a flat rate price guide, you are already billing for the service call and diagnostic fee, at which time you make up a detailed estimate consisting of the list of all costs….1. Service call and diagnostic fee, 2. Labor for performing the repair, 3. Parts cost, and 4. Applicable taxes.

Once you have made the commitment to go flat rate, here's what you ***should not do*** to implement flat-rate pricing into your business if you employ technicians other than yourself:

Buy or design a flat rate system and call a morning meeting to hand them out while you announce "This is what we'll be using from now on."

Here's a 6-Step Plan that outlines what you ***could do:***

1. Schedule a meeting to discuss your plan to implement flat-rate pricing and allow plenty of time for discussion and addressing concerns that are sure to come up. Advise everyone of the date you've chosen to implement the program, which should be *at least* 30 days from the date of this initial meeting. And, remember, in any situation in which there is a change in a work environment, employees often go directly to the fear that the end result of the change might be that they'll be looking for work.

2. Schedule a follow-up meeting to further discuss concerns and answer questions about how it will work. Distributing a sample to everyone (both technical and administrative personnel) who will be working with it is a good idea. Hand out a list of why the reasons flat-rate is a good idea for everyone…customers, the service company, and the employees. Making more money isn't the only motivator (although it's certainly a good one) for people when they're dealing with change. A flat-rate pricing system is good for the customer because they don't have to pay for inexperience. It's better for the service company and its employees because it allows a business owner to calculate costs, get a fair price for professional services, and make an honest profit in the process.
3. Schedule a second follow-up meeting one week away from the implementation date, and that is a few days after you've distributed complete copies. This will allow necessary time for everyone to become familiar with your system and consider what questions they want to ask and what concerns they want to discuss. Remember, asking questions and raising concerns takes courage, so give everyone plenty of time to gather that courage.
4. Do whatever it takes to schedule a meeting at the end of the first day your flat rate system is in use. Talk little and listen a lot. Be open to accepting suggestions and ideas for using flat rate effectively while at the same time standing your ground on the price issue.
5. Schedule a meeting after your system has been in use for a full week. Again, talk little and listen a lot. Don't be discouraged if there is still resistance to the change.
6. At your staff meetings, regularly list your pricing system as an agenda item and be ready for discussions and suggestions on how it's working and what modifications in procedure may be necessary.

Mission Statements….

There are many things that contribute to the success of a service organization, many of which we've covered in this E-Book… things like being dedicated to professionalism, creating a culture of customer service, leading as a service manger rather than just supervising, being a coach and mentor, implementing an in-house training program and employing a flat rate pricing system in order to ensure a fair profit for your company. These are all components of service management excellence, and one way to not only implement all of the things we've covered, but make them part of your business philosophy is to invest the time, money and effort into developing a mission statement, which is simply a clear, concise description of the main goal of your business.

Often, when people are asked for what they think the main goal of their business is, their answer is something on the order of…."Well, that's simple. Make money." or, "Make a profit", or "Charge enough money so you can stay in business."

No, that's not what we mean.

When you establish a mission statement for your business, the idea behind it is that the things mentioned above, all of which have to do with money, aren't the company mission, they are a by-product of accomplishing the company mission. Certainly, paying salaries and suppliers, keeping your service vehicles operating, and other money issues related to keeping your business in business are important, but they're not the *mission* of the business.

Here is an example of a basic mission statement:

"To provide our customers with the best possible service in taking care of their repair needs."

While a mission statement such as this one may sound too simple or obvious, there's more to the idea of developing a mission statement for your business….the MVS Method.

M=Mission

First, you need to decide that you want and need a mission statement and that you want to get it down on paper. And, once it's in writing, take the necessary steps to make sure it becomes the underpinning of your business philosophy. You can post it in your business, not only so employees see it on a regular basis, but also your customers who visit your store or shop. You can also make it available to your technicians on an information sheet that is left with a customer when a service call is completed. It can be on the back of your company business cards, added to your invoices, or implemented into your on-hold telephone system.

Your mission statement helps you stay focused on your business and your customers. When dealing with an irate customer, keeping your mission statement in mind can help you stay cool, laying the groundwork for solving the situation. If anyone in your business is ever tempted to take a short cut on a repair, or rig something up in hopes that it will work so they can get on to their next call, remembering the company mission statement will determine whether or not they go ahead. If it doesn't, then it shouldn't be done. They'll have to find another way, even if it means mustering an extra measure of courage and laying out all the unpleasant details for your customer.

Staying focused on your mission statement provides vision for your company or department. And, since human beings are, by nature, goal-seeking mechanisms, having a mission statement reminds everyone in the business of "What it's all about" and lets everyone know where your company is headed on a regular basis. The end result of a mission statement is that everyone is more content with their employment, and more productive.

V=VALUES

Values are what you believe in….the right thing to do, morals, or whatever you want to call your basic principles of honesty. In any successful service organization, everyone, including the technicians and office personnel, management and supervision, custodial staff, installation crew…..everyone, should have a clear understanding of the established values of the business they work for. And when you take this approach, it not only puts things in perspective for those already working for the company, it helps in the hiring process. You and a prospective employee can decide if you are in total agreement on the company's mission statement and values, and if the agreement isn't there, you can avoid the headache of inappropriate hiring and all its associated problems.

S=STRATEGY

There are two things to consider about strategy and your mission statement. The first is how to develop the mission statement in the first place. That's simple: *Everyone in the organization should be involved in the development of the company mission statement.* It simply won't be the same if a mission statement is decided upon by upper management, and then handed down with the direction for the staff to live by it. The intent of a mission statement is to have everyone in the company have ownership of it, not have it thrust upon them.

The simplest approach to getting this accomplished is to have an initial meeting with everyone and let them know your intent on developing a mission statement. And that's all you'll get accomplished at the initial meeting….letting everyone know that you want them to be involved in developing a mission statement.

At your second mission statement meeting, at which you make more progress (no, you're not going to get it finished in this meeting either) by letting all those involved in developing the company mission statement that the best way for them to help in getting it done is to understand what their individual purpose is within the operation of the company.

Here are five questions you propose to them so they can consider what their personal purpose would be relative to the company mission statement:

1. Do you start most of your workdays with a sense of enthusiasm?

   ______Yes ______ Not Sure ____No

2. Do you have a firm understanding of what you are really good at, and what you enjoy doing?

   ______Yes ______Not Sure _____No

3. At the end of most days, do you feel a sense of satisfaction and accomplishment?

   ______Yes ______Not Sure _____No

4. Do you think that the work you do makes a difference in other people's lives or benefits them in some way?

   ______Yes ______Not Sure _____No

5. Do you feel that your life has a sense of meaning and purpose?

   ______Yes ______Not Sure _____No

Heavy questions, no doubt. And, there's also no doubt that when you propose these questions, most technicians will be uncomfortable answering them in a public environment. That's OK. When you propose these questions by either listing them on a flip chart or handing them out in a printed form, let everybody know that you don't expect this information to be shared unless they make the choice to do so.

The goal of this meeting and the questions you propose is to give them something to think about relative to what a mission statement means and how they would be involved, not only in the development of the mission statement, but the implementation of it and the sustaining of it in the day-to-day operation of the business.

By the way, some technicians may be beyond uncomfortable with these questions, even to the point of considering them to be "stupid" or a "waste of time". In the event that you get that kind of feedback from a technician, consider that it could be one of two things: Either the technician is *really* uncomfortable about answering them, or you've pinpointed a negative influence that you'll need to deal with via counseling, coaching and mentoring. (Refer to Segment Four)

Here are some realities you can point out if confusion, concerns or discomfort (or negativity) comes up when you propose these questions:

Reality #1: Almost everybody has bills to pay.

Reality #2: In order to pay those bills, you have to show up at work and do some work in exchange for the money you need to pay those bills.

Reality #3: Every task you perform at work may not be pleasant, personally fulfilling, enlightening, and bring you joy.

Reality #4: When you are at work, some of the things you do *should* be pleasant, personally fulfilling, and bring you joy.

Your point in presenting these realities is that you know things aren't always perfect, but you want your organization to be able to do the best job possible in taking care of its customers. And the way to do that is by implementing a mission statement, one that everyone in the organization contributes and has input in developing it.

The second factor to consider relative to the strategy of your mission statement is how the company is going to accomplish the mission statement in accordance with the established values. Things like open communication when somebody needs help in deciding what to do in a given situation, allowing everyone in the organization to "fail forward" without repercussions, and meeting regularly to review the mission statement and whether or not it needs revising, are key factors to accomplish the goals of the mission statement.

The last point we want to present about your company mission statement is that it needs to be as brief as possible, so that at any given point, when somebody in the organization is asked what the mission statement is, they'll be able to recite it. If a mission statement is a long, drawn-out, three-sentence (or more) statement, it will wind up where mission statements of this type always wind up: Filed away in a drawer somewhere or posted on a wall in the form of a nice-looking poster that nobody in the organization even "sees" anymore.

A mission statement could be a simple as three words…"Exceed customers expectations"…or it can have more detail. Generally, though, a mission statement that is more than ten words is going to be difficult to remember. So, keep it short. In as many subsequent meetings as it takes to get your mission statement developed, get a draft down on paper, then go back for revision, and repeat the process until you and everyone involved in the development of it is satisfied it's a real fit for the organization.

Jim's Notes On Segment Six….

Congratulations…. You've come a long way on the path to service management excellence. The information on hiring people, helping them grow in their professional development, leading them when necessary, counseling when you have to, and being their coach and mentor, along with providing ongoing, in-house training opportunities for them is all part of the package of being an excellent service manager. And there's been a lot of information to digest, but if you've come this far, you're on your way to achieving that level of excellence that the majority of people don't reach.

When it comes to the two topics of this last segment…charging enough money for what you do and being dedicated to doing it as well as anybody can….there are few thoughts I want to leave you with about flat rate pricing and mission statements.

First, on the issue of pricing the services you provide. I think many service managers and service company owners get confused (and scared) when they decide to set their pricing. Often, they look around at what everyone else is charging, and then, for all intents and purposes, hope that the price they decide to set will allow them to stay in business.

I would encourage you to avoid that trap, and simply determine what your cost of doing business is, and set your pricing accordingly. Do I think that you'll get every call that comes along with your pricing set at a point that will likely be higher than most others? No, I'm sure you won't, and it doesn't matter that you don't. One of the most difficult things we have to learn as service organizations is that we can't "close" every person who calls your to inquire about the price you charge for your services. There are two kinds of people who call a service organization and ask, "How much is a service call?": 1. Customers and, 2. Shoppers. A customer shops for value and a shopper shops for price. And the way I see it, our job as a business that provide a service is that the kind of service we provide is "customer service" not "shopper service". And when you're serious about putting the leadership ideas we presented into practice, getting the right price for the services you provide, the only way you're honestly going to be able to implement those ideas and provide excellent customer service is to get a realistic price for your work.

So, the bottom line on your bottom line is that you need to forget the “what the market will bear” approach when it comes to setting your pricing. As I said, a customer shops for value, which means that a service organization that does everything it can to create a tremendous value for their customers will have all the customers it needs to succeed.

And, some thoughts on mission statements….

Once you figure out your cost of doing business and that you’re taking care of customers, not shoppers, and following through with the development and implementation of a mission statement, your business will prosper. And when your business prospers, the people who work with you in your business will be happier and more content to be there.

And one reason they’ll be happier and more content is because of focus. Everybody needs focus in order to perform as well as they can. Have you ever noticed what happens in the final two minutes of a football game when the score is close? You’ll see the team that has possession of the ball suddenly seeming to line up faster and do everything they do at a higher level of intensity.

The reason….? Focus. And that’s what creating and living by your company mission statement will create for you….focus. Focus for you and focus for your people. Focus on the customer. Focus on doing the best thing for yourself and the customer. Focus on achieving excellence in service management.

I urge you to always strive for excellence in service management. I hope you’ve gained some information, insight, and ideas you can use to assist you in achieving it.

Jim Johnson

APPENDIX A

To determine where a person stands relative to NLP (Neuro Linguistic Programming) and whether they are dominantly visual, auditory or kinesthetic, have them answer the following fifteen questions:

REPRESENTATIONAL SYSTEM SURVEY

The most efficient way for professionals to learn about the different ways in which others process information is to discover their own representational system. Please take the time to answer the following questions, relying on you first reaction when doing so. This survey won't be of much value to you if you endeavor to "make the test come out" the way you think it should. This isn't a test. It's just a survey and there are no "right" or "wrong" answers.

1. When I encounter someone I don't like, I know it:

A. The minute I see them.
B. As soon as they begin to talk.
C. Through what I sense about them.

2. Wind chimes sometimes bother me.

A. True
B. False

3. If I have to spell something, I double-check myself by:

A. Sounding it out.
B. Getting a feeling for whether or not it's right.
C. Seeing it in my mind's eye.

4. When someone assigns a task to me, I understand it well if:

A. It's clearly explained.
B. It's written down or diagrammed.
C. I'm sure about the purpose behind the project.

5. I favor the following hobby/activity group:

A. Sketching, reading, photography.
B. Sports, woodworking, gardening.
C. Musical instruments.

6. When I'm involved in an intense experience, I:

A. Keep my eyes open.
B. Close my eyes and get lost in the experience.
C. Am greatly affected by the sounds and what someone is saying to me.

7. If I were to wake up in the middle of the night, the first thing I would notice would be:

A. The blankets around me.
B. The wind, or the absence of it.
C. The moonlight or other light.

8. when watching a movie in a theater, it bothers me if:

A. The music changes tempo suddenly.
B. The room temperature changes quickly.
C. The picture suddenly goes from dim to bright.

9. When making decisions, I usually handle them by:

A. Writing the options or factors down.
B. Reciting the options out loud.
C. Getting a sense of how I feel about my choice.

10. When I'm driving to a place where I've never been before, I:

A. Rely totally on signs and maps.
B. Get a gut feeling for where I am.
C. Can be distracted and get off course if the area is noisy.

11. When it seem as though problems and situations are piling up, I find that it helps to:

A. Get away by myself and sort things out internally.
B. Write things down to organize and deal with them.
C. Talk things out with someone else.

12. When I arrive at the beach, what I notice first is:

A. The bright sun, the color of the water.
B. The wind, the sound of the waves or birds.
C. The sand between my toes.

13. When I make decisions, it helps to:

A. Sense how I would feel if either choice came to pass.
B. Picture the possible changes within my mind.
C. Hear both sides of a dialogue within my mind.

14. When I'm considering the purchase of an article of clothing, I:

A. Take a really good look at it or picture myself wearing it.
B. Have a conversation with myself about the pros and cons of buying it.
C. Get a feeling about it or touch it to decide if it's something I would enjoy wearing.

15. I find it easier to communicate with people if:

A. They communicate using animation and to-the-point statements.
B. They are easy to listen to.
C. I get a feeling that they know where I'm coming from.

After they have answered the questions, apply the following answer key.

1. A = V B = A C = K	6. A = V B = K C = A	11. A = K B = V C = A
2. A = A	7. A = K B = A C = V	12. A = V B = A C = K
3. A = A B = K C = V	8. A = A B = K C = V	13. A = K B = V C = A
4. A = A B = V C = K	9. A = V B = A C = K	14. A = V B = A C = K
5. A = V B = K C = A	10. A = V B = K C = A	15. A = V B = A C = K

When using this answer key, (except for question #2) change any “A” responses on the survey to the letter “V” for Visual. Change any “B” responses on the survey to the letter “A” for Auditory. “C” responses on the survey are actually ”K” for Kinesthetic.

For example, if somebody chose “A” as their response to question #1 on the survey, simply write the letter “V” next to that answer. Once you have gone through the entire survey (on question #2, the only answer you can change to an “A” for auditory is answer “A”), total up the “V’s” “A’s” and “K’s”. A person who is dominant in one area or another will likely have six or more answers in that category.

PERSONALITY TESTS

A personality test can be helpful in the hiring process. The following test has been used successfully by several Fortune 500 companies.

Please Answer The Following Ten Questions

1. When do you feel your best?

A. in the morning
B. during the afternoon and early evening
C. late at night

2. You usually walk

A. fairly fast, with long steps
B. fairly fast, with short, quick steps
C. less fast, head up, looking the world in the face
D. less fast, head down
E. very slowly

3. When talking to people you

A. stand with your arms folded
B. have your hands clasped
C. have one or both of your hands on your hips
D. touch or push the person to whom you are talking
E. play with your ear, touch your chin, or smooth your hair

4. When relaxing, you sit with

A. your knees bent with your legs side by side
B. you legs crossed
C. your legs stretched out straight
D. one leg curled under you

5. When something really amuses you, you react with

A. a big appreciative laugh
B. a laugh, but not a loud one
C. a quiet chuckle
D. a sheepish smile

6. When you go to a party or social gathering, you

A. make a loud entrance so everyone notices you
B. make a quiet entrance, looking around for someone you know
C. make the quietest entrance, trying to stay unnoticed

7. You're working very hard, concentrating hard, and you're interrupted. Do you

A. welcome the break?
B. feel extremely irritated?
C. vary between these two extremes?

8. Which of the following colors do you like the most?

A. red or orange
B. black
C. yellow or light blue
D. green
E. dark blue or purple
F. white
G. brown or gray

9. When you are in bed at night, in those last few moments before you fall to sleep, you lie

A. stretched out on your back
B. stretched out face down on your stomach
C. on your side, slightly curved
D. with your head on one arm
E. with your head under the covers

10. You often dream that you are

A. falling
B. fighting or struggling
C. searching for something or somebody
D. flying or floating
E. you usually have dreamless sleep
F. your dreams are always pleasant

Once the test has been accomplished, use the test scoring sheet on the following page to assign a number value to each answer.

PERSONALITY TEST SCORING SHEET

POINTS

1. **(A) 2**
(B) 4
(C) 6

2. **(A) 6**
(B) 5
(C) 7
(D) 2
(E) 1

3. **(A) 4**
(B) 2
(C) 5
(D) 7
(E) 6

4. **(A) 4**
(B) 6
(C) 2
(D) 1

5. **(A) 6**
(B) 4
(C) 3
(D) 5

6. **(A) 6**
(B) 2
(C) 4

7. **(A) 6**
(B) 2
(C) 4

8. **(A) 6**
(B) 7
(C) 5
(D) 4
(E) 3
(F) 2
(G) 1

9. **(A) 7**
(B) 6
(C) 4
(D) 2
(E) 1

10. **(A) 4**
(B) 2
(C) 3
(D) 5
(E) 6
(F) 1

With the number values assigned, total up the score and use the following information to determine a personality profile.

Test Point Totals

OVER 60 POINTS:
Others see you as someone they should “handle with care.” You’re seen as vain, self-centered, and extremely dominant. Others may admire you, wishing they could be more like you, but don’t always trust you, hesitating to become too involved with you.

51 TO 60 POINTS:
Others see you as a highly volatile, rather impulsive personality; a natural leader who’s quick to make decisions, though not always the right ones. They see you as bold and adventuresome, some who will try anything once; someone who takes chances and enjoys adventure. They enjoy being in your company because of the excitement you radiate.

41 TO 50 POINTS:
Others see you as fresh, lively charming, amusing, practical, and always interesting; someone who’s constantly at the center of attention, but sufficiently well-balanced not to let it go their head. They also see you as kind, considerate, and understanding; someone who’ll always cheer them up and help them out.

31 TO 40 POINTS:
Others see you as sensible, cautious, careful and practical. They see you as clever, gifted, or talented, but modest. Not a person who makes friends too quickly or easily, but someone who is extremely loyal to friends you do make and who expects the same loyalty in return. Those who really get to know you realize that it takes a lot to shake your trust in friends, but equally that it takes you a long time to get over it if that trust is ever broken.

21 TO 30 POINTS:
Your friends see you as painstaking and fussy. They see you as very cautious, extremely careful, a slow and steady plodder. It would really surprise them if you ever did something impulsively or on the spur of the moment, expecting you to examine everything carefully from every angle and then, usually decide against it. They think this reaction is caused by your careful nature.

UNDER 21 POINTS:
People think you are shy, nervous, and indecisive; someone who needs looking after, who always wants someone else to make the decisions and who doesn’t want to get involved with anyone or anything. They see you as a worrier who always sees problems that don’t exist. Some people think you are boring. Only those who know you know that you aren’t.

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