

Customer service excellence at the University of York

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Introduction

This case study will explore the preparatory work completed by the University of York Information Directorate in order to achieve the Customer Service Excellence (CSE) accreditation. Discussions will cover how the tool has proved useful as an agent of cultural change and as a driver for continuous service improvement. It includes some reflections on how this piece of work has had an impact on how we engage with our users, and with each other, and discusses lessons learnt along the way.

Background

The University of York Information Directorate gained the Customer Service Excellence accreditation in March 2014.

The Information Directorate comprises library, IT and archives and was converged in January 2011. We have just over 240 staff.

Why CSE?

CSE is a practical, evidence-driven tool that tests in great depth priority areas for customers (delivery, timeliness, information, professionalism and staff attitude). Emphasis is placed on developing customer insight, understanding the user's experience and robust measurement of service satisfaction. We started our journey towards CSE in 2011 and the drivers at the time were:

- *to maintain our competitiveness*
Across the higher education library sector in particular, there was evidence of an increase in the number of institutions gaining the CSE accreditation. With the rise in student tuition fees and associated increase in expectations, CSE offered a practical way of demonstrating quality and value for money.
- *to formalise good feedback that we were receiving about our customer service*
Our customer surveys and feedback schemes indicated that we were getting good feedback about our services and were well regarded by our users, but we knew we could do better. By seeking a formal recognition of our high levels of customer service, we could promote our offering more effectively and we could also target areas of weakness that the tool would help us to identify.
- *to move forward our culture*
We had a desire to place customers at the heart of everything we do across the entire department and cement a commitment to constant service improvement. CSE was a framework we could use to stimulate that change.

The start of our journey

As a department we spent a long time discussing and considering the CSE standard before we actually committed to booking in assessment dates. We kept parking the decision about doing the actual assessment itself as the preparatory discussions stimulated lots of internal debate – we asked ourselves whether we should wait till we finished our library refurbishment. Should we seek accreditation across all functions of our department, given that we were newly converged? There was also plenty of self-reflection on whether we were really ready to go for it. This fluctuating confidence about 'the right time' eventually resolved itself and the decision to book our assessment was taken in 2013. The planning then started in earnest and it then took us just short of twelve months to complete our first accreditation.

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Our core team

CSE is a big undertaking and to do it right you need to dedicate resources for it, both to complete the work that you need to do to be ready for assessment, but also to get customer focus and CSE embedded into the way you work. We chose to establish a core CSE planning team of three individuals who were responsible for preparing the department for the assessment; this included a dedicated full-time Project Officer who devoted 100% of their time to driving the initiative forward. The main tasks for the core team fell into two areas:

- responsibility for the logistics of preparing for the assessment, collation of evidence and creation of the documentary submission for the assessor
- responsibility for engaging all staff in the concept of CSE.

The core team put themselves at the heart of the conversation about CSE to help create interest in the process and empower others to get involved, developing our desired culture of users at the centre of everything we do along the way.

CSE Champions

The second critical group we set up to prepare for CSE were our CSE Champions. We chose ten members of staff to be part of this group, using a mix of those who had put themselves forward for this role and strategic nominees in order to ensure that those involved were representative of all three functional areas of the Information Directorate. They came from all levels of the organisation, but there was an emphasis on choosing staff who were able to represent the larger teams within the department.

Our CSE Champions were primarily used as a communication channel, taking messages to and from teams about CSE and charged with getting people talking and thinking about it.

Engaging staff

We used National Customer Service Week in 2013 as a catalyst to launch the final stages of our preparation for the assessment. During the week we sent a daily communication which included top tips for providing excellent customer service, caption competitions, meet the Champions talking heads interviews, as well as the launch of our two new reward schemes – a ‘good ideas’ scheme and ‘nominate a colleague for exceptional customer service’.

Our efforts to engage with staff not only created a buzz around CSE but, more crucially, they also helped start the process of gathering evidence. The next step was to keep track of this and present it in a suitable form for the assessor.

The paperwork

Our CSE submission ended up being an enormous piece of work and ran to over 70 pages. We used Google Docs to create the document as it allowed us to work in a collaborative way. We also tried to be organised, editing and selecting the strongest evidence as we progressed, and keeping a handle on everything we might want to use – simple things like setting up a system that assigned unique evidence reference numbers made a big difference.

Our submission was very thorough (we had so much evidence we had to tell ourselves to stop) and it was a very factual and heavyweight document. It wasn't particularly engaging for our staff and we didn't think many people would want to sit down and read it page by page. To offset this, we decided to introduce case studies to bring some of the evidence to life. These were short snappy articles that highlighted our key pieces of evidence and brought good practice to the fore – they helped tell our story and were circulated to staff to give them a flavour of our evidence and to engage with the assessment contents.

The pre-assessment health check

A few months before our final assessment was due we chose to have a pre-assessment health check. Not everyone bought into our needing one of these; our assessor and our own director both doubted the value of it, but our core team was convinced it was necessary. With hindsight, this was one of the most important dates in our preparation for CSE. In effect, we had to prepare our written submission for the health check, so it drew the line in the sand and focused our efforts ahead of time and away from the pressures of the final on-site visit. It also gave us the opportunity to get a feel for what the final site visit would be like. For example, the mock interviews we ran with our CSE Champions as part of the health check informed our communications to staff about what to expect for the final assessment.

Preparing for the big day

Once our pre-assessment health check was complete, the countdown began to the big day and our planning ramped up another gear. Our leadership team read through our submission page by page to check for quality and to ensure balance across the functional areas in the department. At this stage we were able to have a last push on the weaker areas we had identified and finalise our action plans to address them. For the wider staff, the focus was on yet more communication, including week-by-week messages summing up progress, director briefings on CSE and drop-in sessions for staff who had would take part in the site visit. Finally, we developed a FAQ document to share with staff; we didn't want people to learn a script, but we did need them to have good awareness of key aspects of our activity such as our staff values and our feedback scheme.

The final assessment

Our on-site CSE visit was in March 2014 and took two days. Ninety per cent of the programme was out of our hands and we arranged all that the assessor had requested: tours, interviews with staff, focus groups with users, time for observation, and discussion about processes.

We also chose to add extra time to our final assessment in order to arrange a showcase for our assessor. For this, we selected half a dozen of our strongest case studies that we thought really captured our best practice and asked those involved to give a ten-minute presentation to the assessor in order to bring their story to life. The addition of the showcase was one of the best decisions we made as it demonstrated confidence and widened the number of people we could involve in the assessment itself. Not least it helped us to feel in control of the agenda for a couple of hours!

Success and beyond

The Information Directorate was formally awarded the CSE accreditation in March 2014, and while we began celebrating our success and thanking our staff, we also took the time to reflect, analysing the preparations we'd made in the run-up to the assessment and identifying lessons learnt about the whole process. We asked our staff what they had felt and thought about CSE and explored how it had gone for different groups and individuals.

The positives we found were:

- *Self-analysis*
All the talking and thinking we did in the early days of our preparations meant we knew our weaknesses and had started to think about them before we even had the assessment date in the calendar.
- *Case studies and showcase*
The use of case studies was liked by everyone and the showcase brought

celebrating good practice to the heart of the process, deflecting any criticism that achieving the standard would just be a box-ticking exercise. In fact, we have become so fond of showcasing that we now do it two or three times a year as part of our overall approach to staff development and communication.

- *Getting the date booked*
Once we had dates in the calendar, we knew the scale of our task and became much more focused. We really felt that we generated a buzz with CSE and staff took great pride in showing our best to the assessor – the buildings looked great and our staff were energised and ready to do their bit.
- *Robust planning*
We ran our CSE project like a military campaign – those of us on the core team had become inseparably attached to our clipboards by the time the assessment was taking place. We'd walked the programme, planned contingency, arranged templates and understood the need for all the little extras. This meant we not only provided a structured programme for the assessor but had also arranged access to the secure areas of the building, refreshments on tap, meal vouchers provided, an office base set up with IT and wifi access and a welcome pack of documents laid out on the desk.

The areas for improvement were:

- *Self-analysis*
The talking and thinking that featured as a positive above also cropped up on the negative list. The extensive period spent naval-gazing meant that staff got bored and didn't believe in our commitment to CSE in the early days. We also lost the plot at one stage by over-thinking things, getting bogged down in the criteria and definitions of customers or partners.
- *Communications*
Our staff were critical of our CSE communications, which were too abstract and vague in the early stages of the project. We also over-emphasised that everyone played their part and was expected to do their bit. This resulted in quite a few staff reporting disappointment that they couldn't actually take part in the assessment day. In actual fact, only a handful of our 240 members of staff got to speak to the assessor.

Reflecting on the wider benefits

Since achieving CSE we have also reflected on the wider benefits the process has brought to our department:

CSE helped with skills development among our staff, allowing individuals and teams to explore and acquire new capabilities in the areas of customer focus and customer engagement, thus building their capacity for delivering improved services.

CSE has brought us together as a converged department. The value of celebration and sharing of good practice was something we had entirely underestimated and we have improved cross-departmental working and engagement as a result.

Achieving CSE has also enabled us to proudly promote our excellent levels of customer services to our users and other stakeholders across the university. In part, we have also been able to link our CSE accreditation to improved results

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in both our internal surveys and the National Student Survey. All the indicators suggest that it has been a good thing to do and that we are changing our culture as a result.

The future

As many institutions will know, CSE is a commitment for life and at the time of writing we have just successfully completed our first annual revalidation assessment. For this first check-up we focused on the areas where we only gained partial compliance, so we've been looking at fairness, our complaints process and service standards and working our way through action plans associated with each area. We moved out of partial compliance for all but one criterion and gained another two compliance pluses.

Although we no longer have a dedicated project officer on the team, we maintained a project approach to CSE and retain a core team to drive the process forward. For us this is proving a very successful way of managing the process.

Further embedding CSE into how we operate is now the task in hand. Indications are that this might involve stopping calling and labelling everything "CSE" and instead, fully cementing our customer focus into the way we work.

Good practice is continuing and we are looking to gather evidence at all junctures. We hope this will make our next full reassessment in 2017 seem less challenging than our initial one. Whether we will be successful remains to be seen!

After a natural dip post-assessment, staff are still energised by the process. The CSE message is very much alive within the department and our underlying approach and attitudes have been changed for the better.

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