



INSTITUTE OF SCHOOL & PARISH DEVELOPMENT

*Bringing People, Process, and Ministry Together to Build the*

*Kingdom of God.*

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## *Development Directions*

### ***EVALUATING THE EFFECTIVENESS OF YOUR CUSTOMER SERVICE EFFORTS***

by

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With a new school year, and with a topic that we have written and spoke about so extensively, it is time we revisit “customer service” and see how you are doing with it. Yesterday I had the wonderful opportunity to present a “Customer Service” workshop to all the principals in the Diocese of Baton Rouge. Great group. A lot of energy, and a lot of vision and positive movement. As we spoke, we all continued to realize the importance of shifting our culture to become more welcoming, more inviting, more engaging, and more accessible.

It will be my pleasure to present this topic at the NCEA Convention in New Orleans this coming spring 2011. This subject has so much merit, and it all centers around one statement, that if we believe is true, then we can understand the value of time spent and resources allotted. Here it is:

*A Catholic school will always generate the amount of resources (\$\$\$, new school families, new parish families, community connections, alumni, partnerships) that it deserves to generate. And, what it deserves to generate will always be in direct relationship to the quality of its vision, plan, people and “customer service” culture.*

So, let’s see how you are doing. We invite you to take the TFS Test on “Customer Service.” Directions and instructions are at the beginning and at the end. This is a great tool to use with your boards, your councils, your staff, your faculty, and other leadership groups. It will definitely promote and provoke some serious discussion.

## **True - False - Somewhat Test (TFS Test)**

*Please write **T** if the statement is **True**, **F** if the statement is **False**, and **S** if the statement is neither all **True** nor all **False**. In other words, it is **somewhat true** and **somewhat false**. Please write **NA** for **not applicable**.*

1. \_\_\_ Even though you may not have a formal effort, you do recognize the need for creating a culture of customer service.
2. \_\_\_ Your parish and/or school leaders are willing to listen to new ideas, new concepts, and new dreams -- and then act on them.
3. \_\_\_ Your leaders do not walk around with the attitude that they don't want their customers telling them how to run their parish and/or school.
4. \_\_\_ Your leaders are not threatened by "new" people and the positive impact that they could have on your parish and/or school.
5. \_\_\_ Your parish and/or school has taken a strong stand **against** the following statement: "But we've always done it that way."
6. \_\_\_ Everyone understands the statement: "If you always approach a problem or situation the same way, you'll always end up in the same place."
7. \_\_\_ Your parish and/or school has a clear mission that is shared with all key internal publics.
8. \_\_\_ Your customer service efforts are making progress year-to-year and the yardstick of measurement is the following:
  - Team attitudes
  - New approaches to old problems and situations
  - Creativity
  - Always seeking to improve
  - Leaders buying more and more into a customer service approach
9. \_\_\_ You are always looking to involve people from a Win-Win position by answering the question: What's in it for them?

10. \_\_\_ Your customer service effort of being polite; seeking a win-win stance; viewing parishioners, faculty, staff, parents, students, and alumni as customers of each other, is really working.

11. \_\_\_ You do know the internal and external customers who make up your parish and/or school and how to engage them.

12. \_\_\_ Your database is up-to-date on the following publics:

**Internal**

- Administration
- Faculty
- Parish staff
- Pastoral Council
- Boards and Committees
- Students
- Parent leaders
- Ministry leaders
- Alumni leaders

**External**

- Parents
- Parishioners
- Other parishes and schools
- Alumni
- Grandparents
- Parents of alumni
- Businesses
- Feeder sources
- Media sources

13. \_\_\_ The people involved in customer service have attended one or more professional workshops in order to receive proper training in this field.

14. \_\_\_ You have begun to build a library of professional reading materials on servicing customers in your Catholic parish and/or school.

15. \_\_\_ You have looked for ways to collaborate with your external customers. For example, your pastoral council shares ideas and "workshops" with other pastoral councils in the area.

16. \_\_\_ You have conducted key attitude/image/interest surveys with some of your key customers. In other words, you ARE "pipelining" to your constituents.

17. \_\_\_ You understand that customer service is not a program but a process and an attitude that should permeate the entire parish/school.

18. \_\_\_ You know where you want the customer service efforts to go over the next 1-3 years. In other words, you know what you need to work on – i.e. a more welcoming culture, better hospitality, new parent orientation, better affirmation, etc.
19. \_\_\_ Staff members are invited to play a major role on the “Customer Service Team.”
20. \_\_\_ There is a customer service calendar of events that everyone is aware of and contributes to throughout the year.
21. \_\_\_ The staff understands the customer service process and support it.
22. \_\_\_ You have in-serviced all key internal publics on customer service:
  - Ministry leaders
  - Faculty
  - Staff
  - Parent leaders
  - Leadership Boards and Committees
23. \_\_\_ There is some kind of regular communication to all internal publics demonstrating the customer service culture that is being/has been created.
24. \_\_\_ Staff members have been given opportunities to get involved in the customer service efforts and some are participating.
25. \_\_\_ Staff members have been invited to input into the mission statement.
26. \_\_\_ Internal publics are involved in the new parishioner/parent welcoming effort.
27. \_\_\_ Internal publics (the messengers) clearly understand the mission (the message) of your Catholic parish/school and speak about it in a positive manner.
28. \_\_\_ Your internal publics understand the parish/school's history, heritage, and unique qualities.
29. \_\_\_ You have clearly identified all the key publics with whom you want to relate, and you have strategized ways in which to reach these people.
30. \_\_\_ The person who answers the phone at your parish/school is polite, cordial and treats the call with utmost courtesy.
31. \_\_\_ Receptionists have been trained on how to answer the phone at your parish/school and what to say and what not to say.
32. \_\_\_ Visitors are welcomed with politeness.
33. \_\_\_ The reception area is comfortable with positive reading material.

34. \_\_\_ Parish/school vehicles (if applicable) display positive messages on the side.
35. \_\_\_ The traffic flow before and after school/Mass does not take away from the image your school/parish is trying to project.
36. \_\_\_ You know the neighbors surrounding the parish/school and have made every effort to be on good terms with them.
37. \_\_\_ Parents and parishioners are really viewed as "customers."
38. \_\_\_ The day-to-day needs of the staff, parents, parishioners and students are handled with care and concern by the receptionist(s).
39. \_\_\_ The receptionist sees herself/himself as a key public relations spokesperson for the parish/school.
40. \_\_\_ Staff members see themselves as public relations ambassadors for the parish/school.
41. \_\_\_ Faculty and staff members send notes home reflecting professionalism and organization.
42. \_\_\_ Faculty and staff members attend key meetings outside of the school in order to build community relations and build greater customer relationships.
43. \_\_\_ Staff members speak positively about the school when they are away from it.
44. \_\_\_ The faculty room is a positive area where faculty members can get reinforced and supported.
45. \_\_\_ The Parent - Teacher Conferences are looked upon as an excellent way to foster positive relationships.
46. \_\_\_ Staff members have been educated on how to speak with parents and parishioners and how to work through conflict management.
47. \_\_\_ Staff members greet visitors to the parish/school in a polite manner.
48. \_\_\_ There is a "Customer Service Team" for the parish/school -- a group of people who represent the parish/school out in the public eye.
49. \_\_\_ Parishioners/parents are encouraged to speak positively about the parish/school and have been given "Talking Points."

50. \_\_\_ The bulletin boards within the parish and/or school are decorated with positive messages that reflect the mission.
51. \_\_\_ Parishioner, parent, and staff concerns are met in a timely manner with attention and concern.
52. \_\_\_ The pastor and/or principal projects a positive image -- one that shows a person who does have time for others.
53. \_\_\_ All people are recognized for achievement -- in some manner.
54. \_\_\_ Your parish and school participate in Catholic Schools' Week and uses this time for build customer relationships
55. \_\_\_ The grounds are clean; the grass is cut, and your parish/school projects a clean-cut image.
56. \_\_\_ There is parking available for visitors.
57. \_\_\_ Students have been taught to understand the value of having their uniform neat and clean.
58. \_\_\_ Staff members and administration reflect a professional image by the way they dress, speak and appear.
59. \_\_\_ Your parish/school has a clear logo or visual image that is recognized and accepted by all.
60. \_\_\_ You have clearly identified those 1-15 words that clearly describe your parish/school and what you are all about.
61. \_\_\_ You do have many ways in place for potential parish families and school families to come on your campus for activities.
62. \_\_\_ You have been able to communicate the fact that your parish/school has unique qualities and is here to stay.
63. \_\_\_ Your enrollment effort is built around the word **need** -- the need of a student to find a school that will develop his/her academic and personal potential, and the need of a school to replenish its ranks with students who respond to the kind of institution it chooses to be.
64. \_\_\_ You do know what your potential customers really want.
65. \_\_\_ The entire parish/school is in constant "customer service mode."

66. \_\_\_ You understand the demographics and economics of your geographical area.
67. \_\_\_ Your new customer list is being consistently updated.
68. \_\_\_ You do have some kind of written plan in place to for your customer service efforts.
69. \_\_\_ You do have some kind of affirmation program in place to affirm the work of all of your customers.
70. \_\_\_ Your parish/school does take the position that it should provide a quality Catholic culture to the "customer" and the "customer" is the one who defines quality.

**NOTE:**

It is best to:

- take the TFS Test as a small group or committee, or
- have 8-10 people take it individually, then
- get together to compare answers and discuss.

It is not best to:

- have one person (pastor, principal, DRE, development director, staff, board, PR director, etc.) take the TFS Test and only use that as the basis for assessment.