

Providing a good customer experience in challenging times

Managers' guide & ideas for teams

Introduction

This guide is an accompaniment to the Workbook and PowerPoint used during the April 2024 **Providing a good customer experience in challenging times** half-day workshops. The guide contains suggested answers for some of the exercises and video clips as well as information on how to use the questions in the workbook. The section headings in large red fonts correspond to the section headings in the workbook.

You are welcome to copy, edit and reshare the workbook and PowerPoint both of which can be downloaded from the Red Vanilla website [here](#).

The content of this guide will probably be most relevant for people who have attended the half-day workshop. However team members who have not attended the workshop may still find the ideas and materials in this guide useful if used in conjunction with the workbook and PowerPoint.

Suggestions for when to use this guide:

- During team meetings to address specific customer experience problems or challenges
- As part of improvement projects
- For staff learning and development activities
- Part of induction for new team members
- To support team members to as part of the appraisal process if necessary

The numbered section titles in red font in this guide match the sections in the workbook

Red Vanilla

This guide can be downloaded from
www.redvanilla.co.uk/GRaDE

1. Aims of the workshops

The April 2024 workshops had three aims:

- To help colleagues prevent, respond to and de-escalate challenging situations.
- To help colleagues improve their own resilience to challenging situations.
- To share good customer experience practice and expertise that currently exists within the Trust.

2. The 4 Parts of Customer Experience

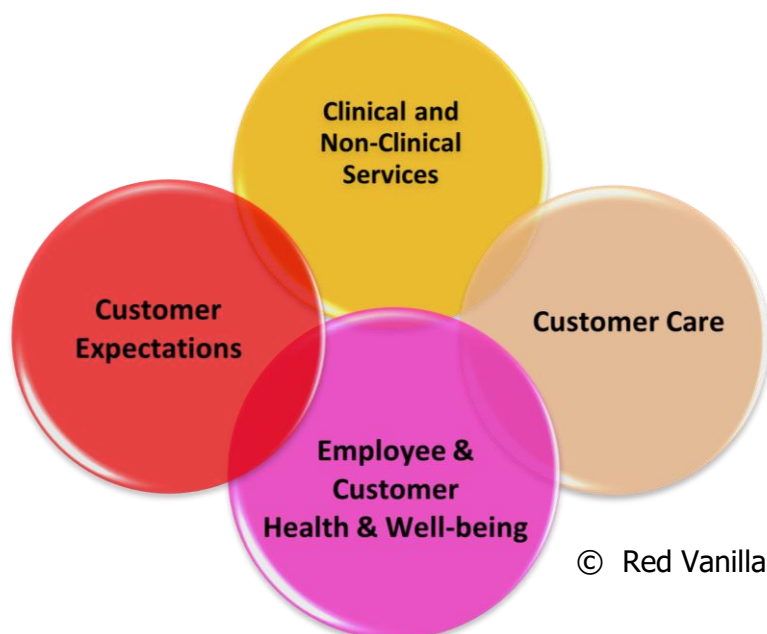
Using the term 'Customer'

'Customer' is a catch-all phrase that we used during the workshops to refer to everyone who the Trust provides a service to. For care groups, the term 'customers' mainly refers to patients and their visitors, carers and relatives. In addition STH colleagues (and colleagues from other parts of the NHS) can be viewed as internal customers.

We are NOT saying that patients are customers in the same way that restaurants, shops and utility companies have customers. **However** taking a 'customer centric' approach to the way we interact with patients, relatives, visitors, relatives and carers etc can help prevent challenging situations occurring. The Trust's PROUD behaviours framework available [here](#) and shown on Page 2 are an example of being 'customer centric'

The four components of customer experience

Throughout the workshops we break down overall customer and patient experience into the four components below. These are described in more detail on page 3 of this guide.



© Red Vanilla

Our PROUD Behaviours Patients, visitors & staff

How we behave towards each other can affect the experiences of patients, visitors and staff and impact our ability to provide the best care possible. The PROUD to Work Together behaviours have been created in partnership with patient representatives, community groups and staff members to set out what you can expect from us and what we expect from you as patients and visitors.



Respect: Be kind, respectful to everyone and value diversity

You can expect us to...

Listen and show compassion towards your needs and choices.

Treat everyone fairly and with respect, and value and celebrate differences positively.

Be open and honest about your care, and say sorry when things don't go as planned.

We need you to...

Be considerate to all patients and staff.

Do the same as us in treating everyone fairly and with respect, and value and celebrate differences positively.

Never intimidate anyone or be aggressive.



Unity: Work in partnership and value the roles of others

You can expect us to...

Work effectively with you and other staff members to offer the best care for you.

Listen to and acknowledge your concerns.

Pay attention to your needs.

We need you to...

Work with us to help provide you with high quality care including letting us know about any concerns you have.

Understand staff are working in the interests of all patients.

Ensure your behaviours are PROUD towards everyone regardless of their role.



Patient First: Ensure that the people we serve are at the heart of all that we do

You can expect us to...

Introduce ourselves and our role and say 'hello' in a friendly manner.

Show kindness and care to patients, and those accompanying you.

Treat you with respect, and discuss your care with you.

We need you to...

Be polite and kind to all members of staff and other patients.

Understand that staff will make decisions based on the needs of all patients.

Be as open as possible about information that will help us to provide you with the best care.



Ownership: Celebrate our successes, learn continuously and ensure we improve

You can expect us to...

Have our ID badges visible at all times and dress in line with the dress code policy.

Prioritise the health and wellbeing of patients and staff.

Learn from mistakes and feedback.

We need you to...

Let us know if you have any needs for your appointment, such as an interpreter or someone to support you.

Take responsibility for your actions and behaviour in any environment where you receive care from us.

Give us feedback on your experiences of receiving care.



Delivery: Be efficient, effective and accountable for our actions

You can expect us to...

Communicate clearly with you, your relatives, and others who are with you.

Take reasonable steps to meet your needs and expectations.

Prioritise your safety at all times.

We need you to...

Arrive at your appointment time and ensure you follow advice about any preparation needed.

Let us know if you can't attend your appointment or are going to be late, so we can make the best use of resources.

Follow instructions that are there to protect patient safety.



2. The 4 Parts of Customer Experience

Four components of Customer Experience

The four components of Customer Experience diagram is designed to help people understand which parts of the overall customer experience they can be expected to influence and have control over and which parts they may have less influence and control over.

1) Clinical and Non-Clinical Services

Generally the level of **Clinical and Non-clinical services** is largely influenced by budgets, staffing levels, Trust priorities, equipment and other resources. There is a limit to how much one individual can influence their whole team's level of clinical or non-clinical service.

2) Customer care

Individual team members are (or should be) in total control of the level of **customer care** they personally provide.

3) Customers' expectations

Individual team members may be able to influence patients and other **customers' expectations** to some extent – especially once a patient is in clinic (if there are delays etc).

4) Employee and customer health & Well-being

Lastly, team members may be able to influence some patients and other customers' health and wellbeing by offering high levels of customer care and by effectively managing expectations.

Page 2 of the workbook provides more details of each of the four components.

2. The 4 Parts of Customer Experience

The importance of the word 'experience'

The video, questions and answer below are designed to demonstrate the following:

Even if someone receives a relatively good clinical or non-clinical service, if that patient's or customer's expectations were not met, and/or the service was delivered with poor customer care, then the overall experience might still be negative.

This is why we use the term patient or customer '**experience**'. The word 'experience' refers to not just the clinical and non-clinical service that is delivered but crucially how patients and customers 'feel' about the service they've received and whether they perceive the experience to be good or bad



This clip from the BBC's The Office shows the difference between service, customer care and customer expectations.

https://www.youtube.com/watch?v=2Z8pgV74_Hw

Q1 Customer Expectations

What sort of experience is the customer expecting?

There are two answers this question. On the one hand Tim, the internal customer is expecting a bad experience as he knows the IT person is uncommunicative. In addition, there has been no communication about what to expect, no-one has told Tim that his computer will have a firewall installed.

Q2 Service

Out of 10 how would you rate the service provided and why?

There are two answer to this question too. On the face of it the firewall has been successfully installed – so a score of between 7 to 10 is acceptable. However, the customer has been left to finish the job themselves and to check the installation was successful so a lower score would make sense.

Q3 Customer Care

Out of 10 how would you rate the customer care provided?

A score of anywhere between 0 to 5 would make sense. The IT guy was unfriendly, unwelcoming and unhelpful. Although he did check that Tim had understood his instructions at the end.

Q4 Customer Experience

What was the customer's overall experience?

Some people will feel that the overall experience was 'ok' – it's what is expected from the IT guy. However many people would say that the overall customer experience was very poor – despite the installation appearing to be successful – as far as we can tell.

Question for teams: Customer Experience – Workbook P4



Page 4 of the Workbook includes 6 questions that we think teams might find it useful to discuss. How and when you consider the questions is up to you and your team.

The questions prompt teams to reflect on what they are good at (sharing good practice) and where there are opportunities to further improve customer experience.

3. Effective Communications

Facial expressions: being welcoming and approachable – Workbook P7

The 12 photographs on page 7 were ranked according to how welcoming and approachable the people in the photos were.

Being seen to be friendly and approachable

When interacting with patients and customers face to face, having friendly and approachable facial expressions indicate good customer care and can significantly contribute to a good overall customer experience – even if the level of service is reduced by long-waits or lack of availability of appointments etc.

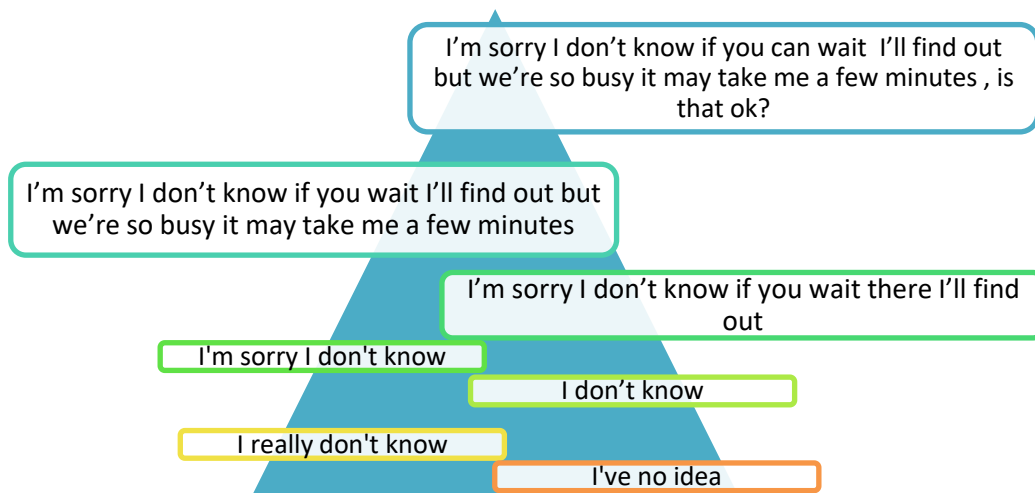
Individual team members could be asked to reflect on which photo they think best represents them most of the time.

Questions for teams: Being welcoming and approachable – Workbook Page 8



Page 8 of the Workbook includes 6 questions that we think teams might find it useful to discuss. How and when you consider the questions is up to you and your team

The words we use – suggested hierarchy of helpfulness answers for Workbook Page 10



Questions for teams: The words we use – Workbook Page 11



Page 11 of the Workbook is an opportunity for teams to identify and share existing good practice in finding appropriate words that can help prevent or deescalate challenging situations.

4. Using Transactional Analysis to influence behaviour

Suggested answers for Jeb's Job video – Workbook Page 15

Jeb's Jobs

In this animated office scene we see a Technical Support team member demonstrate Adult, Parent and Child behaviours.

www.youtube.com/watch?v=tG7hYnMyxyY

YouTube search: Jeb's Jobs Technical Support



1	What's Jeb's state of mind when he first starts answering the phone?
	<p>Answer: Adult to Adults with possibly some nurturing parent</p> <p>Jeb's initial tone of voice and the words he uses indicate he is generally in an adult to adult state of mind, sometimes with an element of nurturing parent.</p>
2	What's his state of mind when someone asks for Mr Strap and Mr Octopus?
	<p>Answer: Critical Parent</p> <p>When faced with rebellious child telephone prank calls, Jeb responds in a Critical Parent way by condescendingly telling the caller 'oh that's incredibly clever, moron'</p>
3	What's his state of mind when he talks about the firewall?
	<p>Answer: Rebellious Child (or possibly Critical Parent)</p> <p>At this stage Jeb is beginning to feel increasingly frustrated and resentful at the continual calls, he might also be tired and hungry. He talks about the firewall causing people to burn in eternal damnation.</p>
4	What's his state of mind when he asks someone to flush the power unit?
	<p>Answer: Rebellious Child</p> <p>At this stage Jeb is fully in a Rebellious Child mode and decides to sabotage the organisation</p>

4. Using Transactional Analysis to influence behaviour

Transactional Analysis with the NHS – Workbook Page 16



David Cameron, Nick Clegg and a camera crew were told to leave a ward at Guy's hospital, London on the 14th June 2011 by Dr David Nunn, an orthopaedic surgeon because proper hospital procedures weren't being followed.

www.youtube.com/watch?v=WIQWaBbURIY

YouTube Search: Irate Surgeon/ David Nunn

Suggested Answers to Guy's Hospital Video

How would you describe the Surgeon's behaviour in terms of Parent, Adult, Child? Answer: Critical Parent then almost immediately Rebellious child

We see the surgeon transition from an initial response of Critical Parent "I'm the senior orthopaedic surgeon in this department..." to a more Rebellious child response: "why are we all told"

How would you describe David Cameron's response in terms of Parent, Adult, Child? Answer: Adult to adult

Note that David Cameron does not even apologise for the behaviour of the team, however he does agree with the Surgeon. Cameron uses adult to adult behaviours to defuse the situation. Some people view Cameron's behaviour as compliant child because he is agreeing with Dr David Nunn. However the way in which David Cameron agrees with Dr David Nunn is not from a position of inferiority but instead from a position of equal power i.e. adult to adult.

How would you describe the person who said "come and talk to me about it" Answer: Nurturing Parent

The member of staff appears to recognise the Rebellious childlike behaviours of Dr David Nunn and takes on the character of a Nurturing Parent.

Why might have the Surgeon behaved in this way?

A lack of communication and frustration at work are likely causes of this non-adult behaviour from the consultant.

Dr David Nunn had not been told that the film crew had been given permission to film on the ward. Are there other instances of gaps in communications within the Trust potentially leading to challenging behaviours and situations?

4. Using Transactional Analysis to influence behaviour

Questions for teams: Transactional Analysis – Workbook Page 17



Page 17 of the Workbook is an opportunity for teams or individuals to consider how they could use Transactional Analysis in practice.

5. Emotional Intelligence

Questions for teams: Emotional Intelligence – Workbook Page 20



Page 20 of the Workbook can be used by teams to discuss how team members can further develop their own emotional intelligence and in particular how teams members can be supported to manage negative emotions and feelings of stress etc.

Amygdala Hijack

Hopefully team members won't have to respond to people having Amygdala Hijacks very often. An amygdala hijack is when someone 'snaps' and appears not in control of their emotions.

Page 23 of the workbook can be used to consider how best to respond to this very challenging situation.

Ideas around choosing positive words, an adult to adult approach, checking people's understanding and expectations and being empathetic can all be used to help defuse a very challenging situation.