

Empower initiative among your staff

It was 17th century French philosopher Voltaire who first said that common sense isn't common. So, if it's any consolation, humans have lacked common sense for centuries. Today I write about another form of common sense - initiative. In particular, the role initiative plays in customer service.

Processes are just a guide

When you first join a company, you are taught to perform a task in a series of (mostly chronological) steps. These steps make up the process. The process helps accomplish a specific goal. You are often not taught or authorised to do this task any other way. One reason for strict adherence to a process is that there is one for every situation. Hence, if you are well trained, you should be able to apply the right process for the right situation. But does sticking to a process always bring the desired outcome? Let's look at an example.

Event: All-you-eat lobster buffet

Process: Each guest is allowed just one helping of baked lobster per serving because it is the most popular item on the menu. If a guest wishes to take another helping, he has to queue again.

Scenario: There are only 3 people in the queue for baked lobster. There are more than enough lobsters to meet the demand. The first guest asks for two helpings. The service staff, following company rules, tells the guest to queue again. By the time he walks to the back of the same queue, he is first in line again, much to his annoyance!

What the service staff could have done was look at the size of the queue and decide if giving this guest another helping would disadvantage the only two other guests in the queue. If no one would be disadvantaged, she should just give the guest another helping, while explaining - with a smile - that she was giving him a second helping only because the queue was short. She could very well have made the day for that guest!

Explain Why along with What

There are two kinds of supervisors - one that behaves like a foreman that expects you to do what he has taught you while he watches over you, and the other who not only teaches you what to do but also explains WHY it had to be done in a certain way. It could be company policy, a market practice or law.

Knowing why something is done gives you a broader perspective of the job and its objective. More importantly, it provides the boundaries within which you could use your initiative to do something outside the process, without crossing the line of propriety. Let's look at this other example.

Scenario: A married couple sold their flat and received a cheque in both their names (XX and XX). The couple do not have a bank account in their joint names but hold accounts in their individual names. The husband wanted the cheque put into his wife's account.

Process: The bank receiving the cheque (the collecting bank) told them that they would have to open a new account in their joint names in order to clear the cheque. That's the process - cheque name must match account name. But opening a new account just to clear the cheque meant the couple not only had to deposit (more) money to open an account they did not need, the bank would also create unnecessary additional work for at least 8 staff members, occupy an account space on their ledger and deprive the couple of the money for a few days because the cheque would have to be cleared through this new account. When the cheque is cleared, both the couple and the bank would have to do more unnecessary work to close the account.

What the collecting bank could do was show due care and diligence in verifying that the couple were the rightful owners of the funds, have both of them acknowledge receipt of the funds and proceed to deposit the funds into the wife's account, as requested. But this could not happen if the bank staff did not understand the responsibilities of a collecting bank and simply served on procedure.

More initiatives in service leads to more happy endings

In just about every case where I see initiative being exercised for the sake of quality customer service, without breaking any rules, I see a happy ending. So, if you wish to distinguish yourself with great customer service, start empowering your service staff with using a lot more initiative.

$$S - I = T$$

Service minus Initiative equals Task

$$P - I = Ds$$

Process minus Initiative equals Disservice

$$P + I = QS$$

Process plus Initiative equals Quality Service