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"Be Our Guest:" Crafting a Magical Client Experience

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ABSTRACT

The Client Services team of Valparaiso University's IT department found inspiration in Disney's guest service models and has been building a culture of superior service throughout IT. Come along on a magic carpet ride to discover how this new world is transforming delivery of technological services to the campus. From Help Desk to training to assessment, we are increasing satisfaction levels among campus constituents as we meet their needs. We will show how we created a guest service compass that guides our decision-making and service delivery. Further, we will share areas where we learned we were creating our own obstacles in empowering staff to provide service to our guests and how we overcame resistance in the quest for continual improvement.

Categories and Subject Descriptors

K.6.1 [**Computing Milieux**]: Management of Computing and Information Systems – *project and people management.*

General Terms

Management, Documentation, Experimentation, Human Factors, Standardization

Keywords

Disney; Client Services; Customer Service; Client Relations; Guest Service; Service Delivery

1. INTRODUCTION

Valparaiso University is a selective, independent Lutheran institution consisting of over 3,000 undergraduate and 1,100 graduate students. The university employs just over 1,200 administration, faculty and staff. Within the Office of Information Technology, our Client Services team consists of 7 full time employees who work with university students and employees to satisfy technology needs across 5 undergraduate colleges, the Graduate School, and the Law School. Our Client Services team coordinates efforts through our Help Desk, training, assessment, communication and some technical support services. We work closely with all IT departments to deliver a high-caliber customer service experience.

2. CUSTOMER SERVICE PHILOSOPHY REVIEW

Through a series of unfortunate events, it became clear that our current model of customer service was not working. This model was based on everybody fulfilling only their job roles and doing their best to satisfy client needs. Two catalysts can be viewed as the impetus driving the change process.

First, our Help Desk went through several periods of transition over recent years and was struggling to provide the best service possible to our client base. Management of the desk was inconsistent throughout the transitions from one leader to another. The first manager was not instilled with the authority to make and execute decisions. The second manager was not prepared for the transition, and was unwilling/unable to accept assistance from other Client Service team members. The student employees were not receiving the guidance and leadership they needed, thus resulting in a decline in client service levels. The student consultants were inconsistently skilled in both customer service and technical areas, because for years we recruited students with a natural propensity toward providing good service and perhaps lacking in technical skills. We always claimed we could teach them to be techies but couldn't teach a service attitude. We were highly dependent on their personal knowledge and experience without providing the students the proper training and job aides required for the position. These factors all combined to result in the user's quality of service being inconsistent depending on which caller was patched through to which student.

The second catalyst was serendipitously placed on top of the Help Desk transition issues. This situation involved a flawed execution of the Active Directory Migration residing on the technical side of the implementation. The beginning evidence of this project's failure revealed itself in our lab images when computers were taking excessive amounts of time to boot up. Furthermore, the printers were not consistently loading on the machines in the labs, resulting in most users not being able to print anywhere on campus. The biggest issues arose when everybody stepped backward to see who might fix the issue, rather than stepping forward to take responsibility and contribute potential solutions. This resulted in poor implementation, poor client service, and poor customer perception of IT.

By this time, Client Services had already begun a preliminary study of the Disney Institute book *Be Our Guest: Perfecting the Art of Customer Service* [1], which describes the Disney approach to customer service. At first, only a few members of our unit started reading the book. We slowly evaluated the Disney

principles within this small group to analyze whether these ideas were a good fit, with our ultimate goal to have the philosophy adopted by our entire department. However, at the point where both of these situations reached their apex, we convened the entire Client Services team to work through the *Be Our Guest* philosophies.

3. WHY DISNEY

First, in the desire for full disclosure, two of the team members are full Disney evangelicals, regularly visiting the resorts and theme parks, also having read multiple books on Disney's service and management principles. Additionally, Disney has built an empire on exceptional guest experience and service. If they could build an empire, we could certainly find applicable concepts that could drive our service levels higher. It was a clear fit for our team. The Disney process described in the book is simple, clear, and focuses on exceeding expectations. The approach to create "magic" was a real draw for the team. The common sense approach to knowing guests, developing quality standards, creating delivery systems and pulling it all together emphasized what we desired for our entire IT department. We wanted to become the model for campus in terms of servicing our clients.

Disney's concept of "magic" abducted our thoughts. This was not something tangible that could be purchased; rather something our end users could easily experience. The other concept that Disney uses is the phrase "plus it up." This is the simple concept that you take an ordinary idea and add the details to make it extraordinary.

Each of these concepts was simple, yet profound from anything we had been doing historically. It also would prove to force all of us out of our comfort zones and set higher expectations of service throughout our team.

4. PROCESS START

Our start into the Disney model was simple. We convened a small task force of four members from our Client Services team to begin the approach. We were each provided with two items: a copy of the book, *Be Our Guest*, and access to a Google Doc we created titled, "The Dream Document." The task force met bi-weekly starting in late spring 2013. Each time we met, we discussed our reading and "homework" assignments for that week.

The Dream Document was a Google document and was updated during each of these task force meetings and became what was later called the "living agenda." The Dream Document was part of the asynchronous reading tasks. Members of the task force were asked to contribute ideas of how we could apply some of the reading to our service improvements or additions. These additions could be added at any time, day or night.

The "magic" of the Dream Document occurred in our Task Force meetings. All members of the task force would use the Dream Document to guide the meeting discussion. We each had our laptop with the document loaded and we would continuously, and synchronously, add in items as the meeting progressed. The idea was that the document would change from a living agenda to a handbook of sorts that would guide our full IT department's level of service.

5. KEY PLAYERS

To give some background, our Client Services team of seven people is loosely organized into three areas as the result of our most recent departmental reorganization. Two staff members fall under each area: assessment and communication, Help Desk, and specialized college support, with a director to guide us all. Before this reorganization, our unit consisted of these same three areas in addition to tech support and classroom technology support. The unit was too large for effective management, so the group was split. Our director worked hard to find different ways to describe our structure so we could easily understand and explain to others why we were grouped together. One of his favorite illustrations is that we functioned like a three-legged stool. The director was the seat of the stool, supported by the three different area "legs." Our work supported his work as director, and in his role, he helped keep us together and working toward the same mission.

From the start, our intention with this project was to make sure it had traction and did not get caught up in theoretical discussions and semantics. The task force was kept small to make sure we were able to get a good, solid start. One person, plus our director, for a total of four members, represented each of the three areas.

At the end of August 2013, we expanded our initiative to invite the entire Client Services team to participate. Each of them was provided with a copy of the book. It was at this point that the previously mentioned issues reached their crossing point. There were a few hard feelings in the progression from small task force to large group discussion. The newer members felt left out of the process, therefore we had to step back and review our first two meetings. The previous task force members also had to spend a little time reinforcing the idea that semantics and theoretical discussions were not to kill the project. This refocused the group on making this a reality-based, task-based, change-based group. Actionable items were discussed and implemented as we worked forward. This implementation would not be completed in just one day …it would be evolving and gradual.

6. IMPLEMENTATION

Starting with the Help Desk, we focused our team on providing excellent customer service. We first developed a guest service compass based on Disney's "Guestology Compass." The compass includes three individual areas plus an area for implementation to put all three areas together.

Figure 1. Guestology Compass

6.1 Guestology

The first area is "guestology," or knowing who our clients are, and what their needs, wants, perceptions, and expectations are. Knowing who our clients are is easy: it boils down to every person with whom we come into contact on campus: they include students, employees, alumni, community visitors, etc. Knowing exactly what their needs, wants, perceptions, and expectations are is trickier. We have long operated under assumptions that we knew what these needs and wants were, and these assumptions may have fallen anywhere from matching the clients' beliefs or being completely opposite. In this process we realized we needed to actually find a way to quantify the answer to the question of what these needs and wants are, instead of continuing to make assumptions.

In our *Be Our Guest* exercise, we developed a comparison chart based on Kinni (2011, p. 40-41) where we compared our own department to Walt Disney World. It was helpful to have Disney as a model for what we would be including in our perceptions /stereotypes and emotions columns. This allowed us to use a concrete example to develop our own client psychographics.

Table 1. Client psychographics

Company	Perceptions/Stereotypes	Emotions
Walt Disney World	Disney is for kids Long Lines Clean Friendly Expensive Fun	Excitement entering the park Tired feet at the end of the day Thrill of Space Mountain
Valpo IT	Don't answer phone/respond Takes forever for tickets to get done They always say no Everyone is so friendly/professional Talk to a full-time employee Unsure of status	Frustrated/Angry Relieved/Grateful for response Hesitation to burden us

Many years earlier, our campus had joined the Higher Education TechQual+ Project. We decided to use this method again in October 2013 as the best way to gather and quantify information relating to our users' needs and wants. The survey was administered to all campus users, and we have begun the task of analyzing the data to shape our future directions and decisions.

6.2 Quality Standards

The second area of the compass was to develop our standards of service. We developed these standards to guide our interactions with our clients, which include several different detailed ways to deliver a good experience, such as eye contact, greeting and welcoming clients, body language, appearance, and genuine thanks and appreciation for the opportunity to serve each individual. These guidelines were taught to the Help Desk students at their two-day training before the school year. All Help Desk staff and Client Services staff are required to adhere to this guideline for service:

1. **Make eye contact and smile!** Start and end every client contact and communication with direct eye contact and a sincere smile.
2. **Greet and welcome each and every client**. Extend the appropriate greeting to every client with whom you come into contact.
3. **Seek out client contact**. It is the responsibility of every staff member to seek out clients who need help or assistance.
4. **Provide immediate service recovery**. It is the responsibility of every staff member to attempt, to the best of their abilities, to immediately resolve a client service failure before it becomes a client service problem. Always find the answer for the client and/or find another staff member who can help the client.
5. **Display appropriate Body Language at all times**. It is the responsibility of every staff member to display approachable body language when visible to clients.
6. **Display appropriate, professional appearance guidelines at all times.** It is the responsibility of every staff member to be within the dress and appearance guidelines at all times when visible to clients.
7. **Preserve the "magical" guest experience**. Always focus on the positive, rather than the rules or regulations. Talking about personal or job-related problems in front of our guests is unacceptable. Use appropriate words and language in all conversations, even personal ones - swearing in front of the client reflects badly on us.
8. **Thank each and every client**. Extend every client a sincere thank you at the conclusion of every transaction. Extend every client a thank you or similar expression of appreciation as he/she leaves your area.

While working on quality standards we identified overarching ideals that would guide every decision we made in offering service to campus. These ideals were prioritized so that we can strive for consistency in determining what is most important as we deliver service. They are also prioritized should one come in conflict with another. In order, these four priorities are:

1. Data Security
2. Courtesy
3. Efficiency
4. Collaboration

In conjunction with developing these standards, we started working on some processes and policies to help us achieve better consistency. One policy we tightened up was our dress code for the students at the Help Desk; we created a uniform for all students to wear to make it simpler for them to dress appropriately and professionally for their jobs. One process we developed was a matrix or rubric that we could use to evaluate each ticket entered by the Help Desk students and assign it a grade.

6.3 Delivery Systems

The third area of the compass was to consider the delivery methods systems for our service. This includes our staff, our settings, and our processes. Staff includes the full time employees as well as the students we employ or take on as interns. The term "settings" refers to any venue or method where we come in contact with clients, including our phone line, our physical Help Desk, our website. Our processes include every task or procedure we employ to provide service, from how we answer the phone, to

how we gather information, enter tickets, troubleshoot, respond to clients, and much more.

6.4 Integration

The final area of the compass is the integration of the other three areas. It is always harder to put it all together, but the great news about our efforts is that we realize we have ongoing opportunities to review and improve. If we find that a particular process isn't working, we will evaluate and revise. If our website needs a change to be more client friendly, we will make the modifications. Ultimately it is the willingness to evaluate and make changes that leads to the service we desire to provide to our campus.

7. REINVENTING OUR IMAGE

Recently, we have re-engaged our clients, and internal IT staff, with a new IT logo that speaks to our new renewed focus. While waiting for a meeting to begin in July 2013, we began to discuss our "brand" and what it means to be IT at our institution. We realized that we didn't have a brand and we were losing our focus. Our mission statement was there, but clients don't read those. We needed something visual that provided both internal and external reminders of our departmental mission.

Figure 2. Valpo Shield of Character

Our institution issues to all members a pin called the "Shield of Character" that all are supposed to wear with pride and as a reminder of what it means to be a member of the Valpo community. At the center, there is a flame for the light of truth, but we saw it as a spark or an ignition. We played off the initials IT in the center of the word ignite. We had some discussions of what we were igniting and we settled on innovation. We want IT to be the center and the catalyst for igniting innovation from both on campus and within the community. Our marketing department worked with us on the art rendering and we have moved into trademarking our new logo which is pictured below.

Figure 3. New IT Department Logo

We realize we are not Disney, but the tried and true methods are continuously reviewed and implemented where appropriate. We are quicker to address client needs and focus on the project, rather than on the delegation of responsibility. Some of our other divisions have been slower to react, but they are coming along.

8. CURRENT STATUS

Starting in June 2013, the entire IT team began taking annual retreats, which will continue into the future. These retreats focus on team building and idea sharing throughout the units. We also work on the overall strategic plan for the department. During these sessions, our Client Services division has started to implement a strategic focus on customer service and "plussing up" the client experience. The aim is to have every member of the IT team focused on the end-user experience in all levels of our institution.

In April 2014, our current Manager of Help Desk Services attended an HDI certification course. Since returning, he has initiated the process of building a service catalog. He has also overseen the replacement of our ticketing system to improve the guest experience. Based on data in both our past and present ticketing systems, customer satisfaction with the Help Desk continues to be high, but because of changing systems, we are unable to draw a direct comparison in order to evaluate improvement.

The results of the TechQual+ survey have been provided to our department leadership, and we are awaiting strategic analysis and recommendations for future decisions and initiatives. Our current plan is to repeat this survey during the 2015-2016 academic year to gauge whether there has been improvement in campus perception of IT and related services.

9. FUTURE PLANS

As we expand the concepts further, our goal is to include other units of our IT department more fully in the process. After all, our entire IT department is responsible for creating magic and exceeding expectations. This vision is shared by our CIO. In our planning meetings, we have often discussed the idea that we want IT to fade into the background. This way you almost don't notice us...but this is not ideal either. We want our entire IT staff to be involved in campus activities throughout the university. We want people to know everybody in our group! After all, we have a pretty amazing cast of characters ourselves!

10. REFERENCES

[1] Kinni, Theodore. *Be Our Guest: Perfecting the Art of Customer Service*. Disney Editions, New York, 2011