Project Aspen:
How customer service supports organizational culture and end-user experience in healthcare
Patients expectations’ of customer service has changed, but service in healthcare has remained the same.

How might we provide a flexible framework for healthcare organizations to develop best-in-class customer service?
Project Aspen

Working with the innovation group at a major cancer center, our team developed a framework that is flexible enough to meet the needs of many different departments while still uniting the organization as a whole. We named it after the Aspen because of its unique status as both a group of individuals and a single unified organism.

Patient Experience
The experience of each patient is unique between the many different departments of the cancer center just as a person in the forest sees each individual Aspen tree as its own entity.

Customer Service
The strategy, systems and structures to enable experiences that embody a company’s values and promote desired outcomes just as a unified root system support the Aspen grove.
Cancer center’s unique set of attributes

**Precision**
Patient safety is the number one priority at the cancer center which requires precision is often placed above service.

**Strong culture(s)**
At this cancer center there is a strong culture of academia and of hierarchy that impact how the organization makes changes.

**Hospitality**
While patients come to the cancer center for the health services, they also need the amenities of a hotel: bed, waiting rooms, reception and environmental services staff.

**High risk**
Like precision, the actions of a cancer center staff member have enormous ramifications for patients.

**Service is ancillary**
While service impacts patients and families, they have come to the cancer center for health.

**Large service network**
With 44 different departments distributed across a major metropolitan city, creating consistency is a challenge for the cancer center.

**High stress and/or emotion**
Any healthcare environment can be stressful, a fact compounded in a cancer center.

**One-time commitment**
Patients make huge investments of time, money and energy into their engagement with the cancer center and hope it is not a reoccurring expense.
Using the set of attributes we developed with the client, we selected 23 organizations in industries ranging from hospitality to retail and financial services all known for their customer service and all sharing at least one key attribute with the cancer center.

We conducted 28 interviews with both front line staff as well as corporate level experience leads. Using these interviews, we developed 15 case studies examining how different companies defined customer service and how that impacted their training, structure, culture, metrics and incentives.
Existing Customer Service Frameworks are...

1. Too hierarchical
Solutions that we encountered often relied on a top down model of hierarchy. At the cancer center the relationship between top administrators and top doctors at the center is more complex.

2. Too abstract
Our clients at the innovation center were specifically looking for a framework that provided clear options on how to move forward. Existing models were too high level.

3. Not appropriate for Healthcare
Many of the models focused on commercial and retail concepts like maintaining customer loyalty.
Our Framework must

- Allow for personalized clinical care
- Provide consistency across a complex system
- Allow for complicated decision making
- Embrace the values of the medical community
- Provide a clear path forward
Project Aspen

Develop customer service strategy within hospital

Gain knowledge to refine strategy and delivery

Empower Hospital to deliver best-in-class customer service

Customer Service Philosophy
Actionable Principles
Collective identity and values

Structure
Strengthen

Support and tools
Evaluation and recognition
Oversight and accountability
FRAMEWORK CASCADE

Organizational Level

Define
- Customer Service Philosophy
- Collective identity and values
- Actionable principles

Demonstrate
- Support and tools
- Evaluation and recognition
- Oversight and accountability

Tailor
- Customer Service Philosophy
- Actionable principles
- Collective identity and values

Guide
- Support and tools
- Evaluation and recognition
- Oversight and accountability

Personalize
- Customer Service Philosophy
- Actionable principles
- Collective identity and values

Drive
- Support and tools
- Evaluation and recognition
- Oversight and accountability

Strategic Group

Individual

- Structure
- Strengthen

- Structure
- Strengthen

- Structure
- Strengthen

- Structure
- Strengthen
A customer-service ‘north-star’ guides staff decisions about care delivery when interacting with patients

Stories from the field

Funeral Home

“This is the only funeral this family will have for their mother. We treat each funeral like it is the first we have ever hosted. Families should feel comfortable and cared for above all else.”

Phillip, Funeral Director

Target’s Be Obsessed with the Guest

“Our new CEO goes shopping at Target stores dressed in normal clothes to interact with guests. When he joined, he set a mandate that all of his direct reports have contact with guests on a monthly basis and this has trickled down through the company.”

Mark, Lead Product Strategist
Developing support and creating vision

Customer Service Philosophy

A customer service ‘north-star’ to act as a guide for staff to refer to when interacting with patients or making decisions about their care delivery

Know your Customer Service Strengths
Collect current personal customer service philosophies from the cancer center's customer service all-stars as a jumping off point for creating North Star statement

Near Term Ideas

North Star Statement
A single phrase or statement that distills the cancer center’s approach to customer service and how it relates to the overall organizational mission

Long Term Ideas
Research Cannot Happen Without Patients
Reframe the message around clinical research to stress that respect and empathy for patients is key for the success of cancer of research

Behavioral Science Reference
People are predisposed to rely on a consistent reference point when making choices. Therefore, establishing a higher purpose and emphasizing a common cause will increase the likelihood of individual action.

- Anchoring
- Availability
- Status Quo Bias

Case Study Examples
- Target
- Funeral Home
- Disney
- Mayo
- Hyatt
- Apple
- Southwest

Challenges the may face
No one person or entity is currently accountable for patient service views and senior leadership is not convinced of the value service adds

Behavioral Science Reference
People are predisposed to rely on a consistent reference point when making choices. Therefore, establishing a higher purpose and emphasizing a common cause will increase the likelihood of individual action.

- Anchoring
- Availability
- Status Quo Bias

How the cancer center is positioned to excel
The cancer center’s prestige as best in class uniquely positions them to set an new industry standard including customer service and staff evaluation

Personalize North Star Workshops
Workshops for individual employees define what the north star means for them and how they can support it
ACTIONABLE PRINCIPLES

A set of principles that outline specific goals and outcomes for patient interactions to guide staff and bridge the abstract customer service philosophy to the tangible delivery of service.

Stories from the field

APPLE’s Steps to Service

A-Approach customers with a personalized warm welcome
P-Probe politely to understand all their needs
P-Present a solution for the customer to take home today
L-Listen for and resolve any issues or concerns
E-End with a fond farewell and invitation to return.

Disney’s Four Keys

“The Four Key basics, are how I build every decision that I make. That is how we are able to deliver on the promises of safety, courtesy, show, and efficiency—in that order.”

Disney Customer Service 101, Disney Institute

Developing support and creating vision

Actionable Principles

A set of principles which outline specific goals and outcomes for patient interactions to guide staff; bridging the abstract philosophy and the tangible service.

Case Study Examples
- Plastic Surgery
- Apple
- Social Worker
- Disney

Behavioral Science Reference

The ways choices are presented affect the decisions we make. Amos Tversky and Daniel Kahneman’s prospect theory explains how the way in which options are “framed” impacts our perception of the right choice, or even what’s available to choose from.

- Loss Aversion
- Information Overload
- Mental Accounting

Near Term Ideas

Tactics Brainstorm Workshops
Groups work collectively to develop a list of tactics relevant to their role to carry out the actionable principle; this list is posted at employees work station.

Customer Service Acronym
Leadership develops an MSK acronym to guide decision logic for customer service delivery.

Long Term Ideas

Weaving Customer Service into Job Evaluation
Prioritizing customer service as criteria for job promotion and rewards when considering candidates for promotion and incentives.

Customer Service Oath or Promise
Have all employees make a customer service promise outlining how their role contributes to positive patient experiences.
Celebrate brand attributes and make them tangible to provide patients with evidence of a defined customer service culture throughout the organization.

Stories from the field

Southwest Screens for Friendliness

“When you’re up in the air there is no boss, there is no manager watching you. That is why they screen applicants so hard. Southwest knows who I am and knows that I am great with the passengers.”

John, Flight Attendant

Why Mayo Cares about Dirty Shoelaces

“A dirty shoelace might seem pretty minor, given the important work of caring for the ill. But a shoelace is something a customer can see, whereas medical expertise and technical ability are not. Even a shoelace is piece of evidence, a small but integral part of the story Mayo tells to its customers.”

Clueing In Customers, HBR
Developing support and creating vision

Collective Identity and Values

Celebrate brand attributes and make them tangible to provide patients with evidence of a defined customer service culture

Case Study Examples
- Target
- Funeral Home
- Disney
- Mayo
- Hyatt
- Apple
- Southwest

How the cancer center is positioned to excel
Common pillars for hiring and staff that truly cares about their patients

Challenges the cancer center may face
The cancer center’s pride is driven by science, not service, and many people believe customer service is outside of their job description

Behavioral Science Reference
A person’s understanding of “who I am” informs decision making. Additionally, our minds are more heavily influenced by front of mind stories with vivid examples.
- Fundamental Attribution Error
- Endowment Effect
- Chameleion Effect

Near Term Ideas

Customer Service All Star Committee
Making current The cancer center customer service all stars a part of hiring committee

Show Team Biographies and Personal Goals
To facilitate conversations around connecting personal and team goals with the cancer center identity

Long Term Ideas

Showing Your Team’s Colors
Tap into the cancer center pride and recognize customer service with branded swag

History’s Sticky Story
Codify the cancer center’s history into a sticky 20 second story that highlights the institution’s prestige, heritage and customer service DNA
A robust set of tools and support for frontline staff, including on-boarding, training, career development, and open scripts.
Empowering the cancer center to deliver best-in-class customer service

Support and Tools

A robust set of tools and support that removes barriers in order to make it as easy as possible to deliver excellent service. This includes on-boarding, training, career development, and open scripts.

How the cancer center is positioned to excel
Strong orientation and technical training for new hires

Challenges the cancer center may face
Little focus on patient service in formal training and any existing structures focused on efficiency may hinder improvements

Behavioral Science Reference
Using more concrete (instead of abstract) language can help people feel ownership over concepts. Empowering people to control what they want and giving them options to feel personally meaningful increases self-control.

- Mental Accounting
- Status Quo Bias

Case Study Examples

- Hyatt
- Starbucks
- Apple
- Social Worker
- CityMD
- Disney

Near Term Ideas

Visual Patient Journey Posted in Rooms
Provide both patient and staff with a sense of orientation around the patient’s journey and to provide staff with an easy-to-access context for patient’s frame of mind.

Keeping Patient Goals Top-of-Mind
Capturing patient’s personal goals on white boards posted in patient rooms to keep focus on keeping life normal.

Long Term Ideas

Master Customer Service First
First 2 weeks on the job focused only on customer service to ensure that customer service approach becomes the default mode for all cancer center staff.

Developing a Professional Storytelling Culture
Incorporate story-telling methods into trainings at every level to support communication with patients and between the cancer center staff members.
Timely feedback from patients to evaluate and recognize staff for their service delivery to impact culture and set new customer service standards

Stories from the field

**McDonalds’ Customer Analytics**

McDonalds looks at sales and surveys as methods for measuring success. They focus on this information for implementation, tracking and revising methods. The customer service team is essentially a metrics and analytics team.

Marcie, Head of Experience Design

**Louis Vuitton Store Bonuses**

“We each have individual scores for customer service so we can know where to improve but our bonuses are based on our whole store’s performance. That makes it easier to focus on the customer needs.”

Jessica, Sales Associate
Empowering the cancer center to deliver best-in-class customer service

Evaluation and Recognition

Timely feedback from patients to evaluate and recognize staff for their service delivery to impact culture and set new customer service standards.

How the cancer center is positioned to excel
The cancer center’s prestige as best in class uniquely positions them to set an new industry standard including customer service and staff evaluation.

Challenges the cancer center may face
Current metrics are quantitative, delayed and may be difficult to act upon.

Behavioral Science Reference
Our present context takes priority, therefore feedback should be responsive and immediate. People make better choices in the more rational present-tense. People also struggle to know where they are in a process and rarely feel like their actions are making an impact.

- Progress Principle
- Feedback Loops
- Mental Accounting

Case Study Examples
- McDonalds
- Louis Vuitton
- Target
- Starbucks
- Mayo

Near Term Ideas

Customer Service Legend of the Month
Collect and share customer service wins across the organization to celebrate staff, reinforce values, and share best practices.

In-the-moment Patient Feedback
Leveraging digital tools such as apps or e-mails, to make collecting real-time feedback fun, simple, and easy which will allow MSK to celebrate wins and address concerns while the patient is still there.

Long Term Ideas

Expanding Data Collection Channels
Expand channels of data collection to get as granular individual data as possible. Use channels such as yelp reviews or instagram tags to anticipate patient needs and assess customer service performance.

Leveraging Big Data Analytics
Using big-data to analyze digital behavior to uncover new insights. For example: tracking patients’ paths through the cancer center website, and determining, for specific types of patients, which information is most relevant.
Oversight and accountability at every level to track progress, ensure alignment with north star, and provide a sense of progress

Stories from the field

Escalating Needs at Credit Suisse

“There’s always open communication with our Compliance officer. If there’s any kind of problem, we have to report it immediately. That’s a firm-wide policy to track any complaints and ensure they are addressed.”

Mary, Relationship Manager

Southwest’s Reward Points System

Employees are constantly earning “points” for their bank. These points are accumulated for everything from being on time to customer emails. It is important to remember they are always working underneath the guise of incentive.
Empowering the cancer center to deliver best-in-class customer service

Oversight and Accountability

Oversight and accountability at every level to track progress, ensure alignment with north star, and provide a sense of progress

Case Study Examples
- Credit Suisse
- Southwest
- CityMD

How the cancer center is positioned to excel
Hierarchical structure and academic roots allow for receptive learning and feedback

Challenges the cancer center may face
While the cancer center retains employees, they often change roles, creating the potential for groups to lose institutional knowledge

Behavioral Science Reference
People struggle to change on their own. Providing an external force—such as a third party, written promise, or social accountability, and social pressure are some of the ways to help keep people on track.

- Endowment Effect
- Ego Depletion
- Status Quo Bias

Near Term Ideas

Interdisciplinary Customer Service Committee
Leadership from diverse departments with authority and resources to implement customer service strategy

Customer Service Nudges
“It’s 10 o’clock, do you know where your patient is?” Reinforcing ownership of patient needs past standard interactions

Long Term Ideas

Transparent Departmental Goals
Transparent departmental goals around customer service with timeliness for improvement shared organization wide

Customer Service Experts and Advocates
Dedicated career track for those with interest and skill in developing MSK patient service systems
Gaining knowledge about the delivery of service to strengthen the customer service approach and in turn improve and refine service delivery

Stories from the field

CityMD’s Customer Service Committee

“Each area has a customer service committee—front desk, medical education, clinical team. They each work to design their own piece and then come together to make sure the pieces fit. We are constantly learning from what happens in the clinic and adjusting.”

Ashok, C-Suite Leadership

Lurie’s Daily 5-Minute Calls

Nurse leaders check in with the families in their units everyday. Every morning the nurses have a five minute call with directors of other departments to share problems that came up, how they will be addressed.
Gaining knowledge to refine strategy and delivery

Strengthen and Structure

Gaining knowledge about the delivery of service to strengthen the customer service approach and in turn improve and refine service delivery

<table>
<thead>
<tr>
<th>Case Study Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mayo</td>
</tr>
<tr>
<td>Lurie</td>
</tr>
<tr>
<td>Target</td>
</tr>
<tr>
<td>CityMD</td>
</tr>
<tr>
<td>Southwest</td>
</tr>
<tr>
<td>Credit Suisse</td>
</tr>
</tbody>
</table>

How the cancer center is positioned to excel
Patient care requires the coordination of interdisciplinary teams and communication

Challenges the cancer center may face
Limited communication across specialty and role with siloed reporting structure and culture

Behavioral Science Reference
People rely on their own limited experiences to make decisions. This limits their options to solve similar but new problems. Reframing a problem can help shed light on new possibilities.

- Hyperbolic Discounting
- Sunk Costs
- Representativeness
- Confirmation Bias
- Expertise Bias

Near Term Ideas

Communicating Care
Five minute check up call with different department leads, relating to patient care

Sharing Best Practices
Collecting and disseminating best practices from across the organization highlighting customer service bright spots

Sharing Wins and Actionable Feedback
Managers across departments and divisions call each other to share feedback

Long Term Ideas

Prototype to Learn
Prototype customer service strategies within specific disciplines with intention to scale successes hospital-wide

Interdisciplinary Hackathon
Members in different roles within or across departments participate in day-long hackathon to develop unique customer service solutions for MSK
PROJECT TIMELINE AND CLIENT ENGAGEMENT

Client engagement
- Kick off meeting
- Interviews with director level
- Stakeholder map
- Orthodoxies activity

Site visits
- Analysts workshop
- Case study deep dive
- Establish design principles
- Interviews with cancer center customer service 'bright spots'

Final share out
Delivery of playbook, final case studies, and final framework

Process takeaways

#1 Multi-use tools to communicate with clients

Working with a talented internal innovation team as a client provided us with a unique opportunity to leverage their skills and knowledge about the organization and also about design. In our weekly reports, we used two frameworks to communicate our changing point-of-view. These became vital to make the most of our quick weekly check-ins. The client later told us that the tools made it easy to share project progress with the cancer center C-suite.

#2 Modeling as exploration and a thinking tool

Early on in the project we began a weekly exercise of creating a customer service framework model based on the information we had so far. This solidified our learning for the week and prepared us for our next steps.

When we reached the end of the project, the model we produced was much more sophisticated because of these early drafts.

These sketches also served as a visual tool for the team to map what we had learned and how our perspective had developed.

Weekly updates which included:
- What we did, learned, and will do next
- We used to think, now we believe and so we well

Remote
General secondary research

Team actions
Analogous company interviews

Frameworks

September          October          November          December
Thank you.

Research Findings and Strategic Framework
December 7, 2015

IIT Institute of Design, Chicago
Anita Lee, Claire Hevel, Gordon Grado, Sarah Norell, Tara Flippin
Faculty Advisor Jeremy Alexis
SELECTED APPENDIX

General Customer Service

8 Customer Service, HR and Leadership Secrets From The 5-Star Broadmoor Hotel, Forbes

Advancing the Customer Experience, Harvard Business Review Analytics Services Report
https://hbr.org/resources/pdfs/comm/disney/advancing_the_customer_experience.pdf

Competing on Customer Service: An Interview with British Airways’ Sir Colin Marshall, Harvard Business Review

Customer Experience Creation, Journal of Retailing

Customer Experience in the Age of the Internet of Things, Harvard Business Review

Customer Service Needs to Be Either More or Less Robotic, Harvard Business Review
https://hbr.org/2014/11/customer-service-needs-to-be-either-more-or-less-robotic

Customer Service Training For Your Employees Starts With Their Original Trainers: Mom and Dad, Forbes
http://www.forbes.com/sites/micahsolomon/2013/12/05/the-best-customer-service-training-for-your-employees-it-comes-from-their-parents/

Designing Luxury Experience, The European Business Review
http://www.europeanbusinessreview.com/?p=4469

Employee Emotional Competence: Construct Conceptualization and Validation of a Customer-Based Measure, Journal of Service Research
http://jsr.sagepub.com/content/early/2015/06/24/10946705155590776.full.pdf


Four Lessons on Culture and Customer Service from Zappos CEO, Tony Hsieh, Harvard Business Review

Here’s How to Actually Empower Customer Service Employees, Harvard Business Review
https://hbr.org/2013/07/heres-how-to-actually-empower-customer

How I Did It: Zappos’s CEO on Going to Extremes for Customers, Harvard Business Review
https://hbr.org/2010/07/how-i-did-it-zapposs-ceo-on-going-to-extremes-for-customers

Leading by Leveraging Culture, California Management Review
http://faculty.haas.berkeley.edu/chatman/papers/18_LeadingLeveragingCulture.pdf

https://hbr.org/2013/06/new-research-youre-doing-cus

http://jom.sagepub.com/content/early/2014/11/03/0149206314557158.full.pdf

Stop trying to delight your customers, Harvard Business Review
https://hbr.org/2010/07/stop-trying-to-delight-your-customers

The 10 Keys of Excellent Customer Service, Forbes

The Four Things a Service Business Must Get Right, Harvard Business Review
https://hbr.org/2008/04/the-four-things-a-service-business-must-get-right

The Role of Corporate Image for Quality in the Formation of Attitudinal Service Loyalty, Journal of Service Research
http://jsr.sagepub.com/content/early/2013/03/20/1094670512466441.full.pdf

The Secret to Delighting Customers, Harvard Business Review
https://hbr.org/2013/12/the-secret-to-delighting-customers/


Understanding Customer Experience, Harvard Business Review
https://hbr.org/2007/02/understanding-customer-experience

We have a culture crush on Warby Parker, Big Spaceship
http://www.bigs spaceship.com/warby-parker-culture/
APPLE

Apple’s Secret Employee Training Manual Reinvents Customer Service in Seven Ways, Forbes

The Brilliant Genius Bar Manual That Teaches Apple Employees How To Manipulate Customers, Slate

The Art Of Anticipation: Why Apple Stores’ Retail Customer Service Is Better Than Yours, Forbes

BEHAVIORAL ECONOMICS

The Business Of Behavioral Economics, Forbes

DISNEY

Correcting Mistakes to Ensure Customer Loyalty, Disney Institute
https://cdns3.trainingindustry.com/media/3998204/disneycustomerloyaltyqualityservicelessons.pdf

Disney Customer Service 101: Why Courtesy Is Not Always Our First Priority, Disney Institute

Forbes, Customer Service The Disney Way, Forbes

Disney Knows It’s Not Just The Magic That Keeps a Brand on Top, Forbes

MAYO

Clueing In Customers, Customer Service case study on Mayo, HBR
https://hbr.org/2003/02/clueing-in-customers

Creating and integrating a new patient experience leadership role: A consultative approach for partnering with executive and clinical leaders, Journal of Patient Experience. An exploration of Mayo’s structural approach
http://pxjournal.org/cgi/viewcontent.cgi?article=1074&context=journal

Customer Service Can’t Just Be Two-By-Two: Lessons From Four Seasons To Mayo Clinic, Forbes