

# Increasing Customer Satisfaction and Working Relationships in Research Administration

NCURA Regional Meeting April 16, 2012  
Melanie Jacobs and Shayne Sims

## Facilitators

### Melanie Jacobs

- University of Wisconsin-Madison
- Central Office, Preaward
- 1 billion in sponsored research awards FY 2011
- Central Office has 14 preaward, 8 contract, and 36 postaward employees

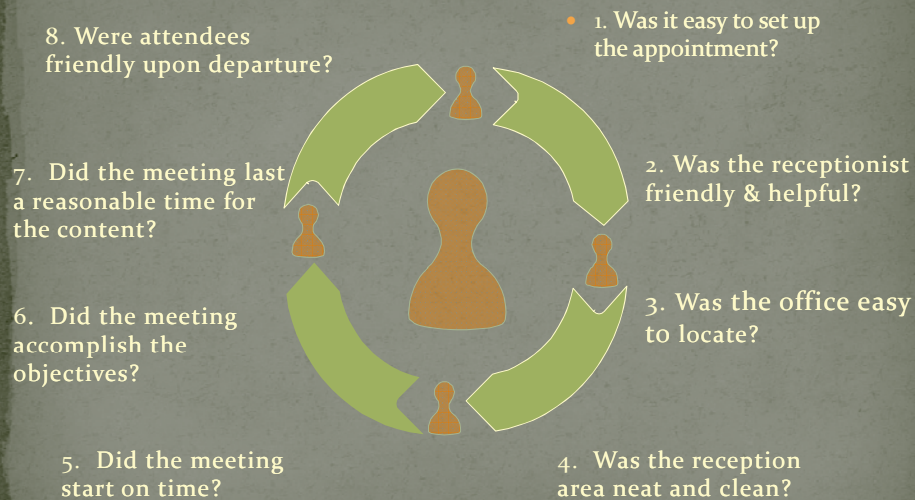
### Shayne Sims

- Texas Tech University
- Central Office – Preaward
- 63 million in sponsored research awards FY 2011
- Central Office has 5 preaward, 2 contract, 4 post award employees

## Customer Service In Research Administration

- Define Customer Service
- Identify our Customers in Research Administration
- Discuss Moving from Good to Great
- Identify Key Customer Service Skills
- Discuss Strategies for working with our Customers

## Moments of Truth: Cycle of Service



Texas Tech University – Service Plus Training

## What is Customer Service

Customer service is a series of activities designed to enhance the level of customer satisfaction – that is, the feeling that a product or service has met the customer expectation. - *wikipedia*

Customer service is not a single department within an organization, it is everyone's job.

“Customers don't expect you to be perfect.

They do expect you to fix things when they go wrong.”

- *Donald Porter, V.P.  
British Airways*





## Customer Service:

Just do what they want,  
when they want it,  
how they want it.

## How do we determine the Value of Great Customer Service?

We look at the costs of Poor Service which are hidden in:

1. The # of times a Colleague calls and doesn't reach the assistance they are seeking
2. The # of times a Sponsor has to call back to find out what happened to their request from a week ago
3. The effort You made to find out exactly what happened
4. The cost of doing things over that could have been done correctly
5. The bad mouthing a PI gives your office when they are upset

## Cost of Poor Customer Service in Research Administration

- Poorly prepared proposals
- Missed funding opportunities
- Delayed set-up of accounts causes payroll issues
- Missed charges on awards because they were late or done incorrectly
- Late financial reports
- **AUDIT FINDINGS**

\*Think about examples of how poor customer service has negatively affected your office.

## Top Ten Research Administration Service Errors

1. Losing a proposal or award
2. Failure to submit financial reports in a timely manner
3. Failure to process documents promptly
4. Failure to bill in a timely manner
5. Failure to respond to phone calls and email
6. Allowing voicemail to become full
7. Failure to be clear and concise in communications
8. Failure in following up on negotiations
9. Promising a response by a certain date and failing to deliver
10. Saying NO without some consideration of other options

Source – David Richardson, Penn State University, NCURATV Sept 2008



## How are we different?

### In other types of business:

Greater Customer Service = Higher Customer Satisfaction =  
Higher Customer Loyalty = Greater Profits =  
Employee Job Growth and Job Security

### In Research Administration:

Our sponsors don't come to our institutions because of "us",  
they come because of the science and the work of our  
principle investigators.

In most scenarios our internal customers have no choice but  
to call on us.

## Identifying our Customers in Research Administration

---

External Vs. Internal

## Our “Customers”

### Internal vs. External customers

#### Internal

Preaward/Postaward counterparts  
Deans offices  
RSP/SPO offices  
Departmental Research Administrators  
PIs and PI support staff

#### External

Sponsors  
Subawardees  
Auditors?

## Customers

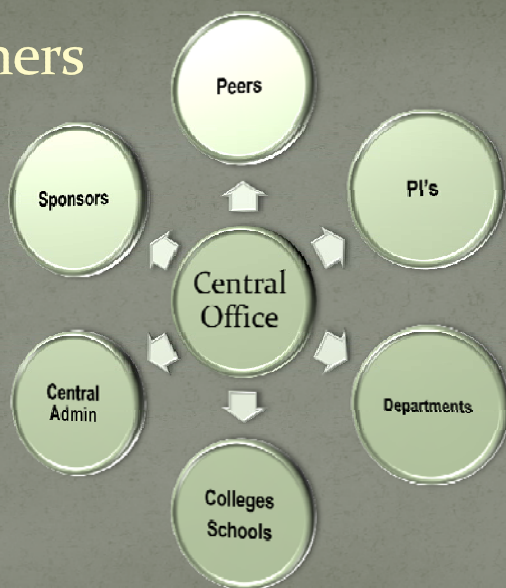


Image by: Kim Moreland, 2009 UW Madison



## What next – Moving from Good to Great

- Determine the realities of your office:
  - Procedures,
  - People,
  - Resources
- Develop a Mission Statement
- Make a plan and move forward

## Customer Service In Research Administration

### What are the realities?

We must maintain a place of balance between facilitating the research initiative to the best of our abilities and ensuring that we are meeting the regulations placed upon us by our sponsors.

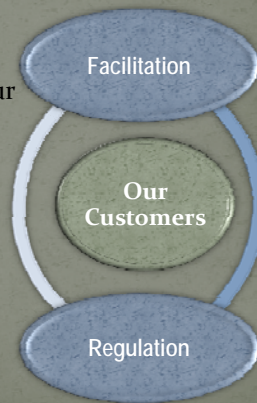


Image by: Kim Moreland, 2009 UW Madison



## Customer Service

Why do we do business the way we do?

- Laws, Regulations, Guidelines
- Federal, State, University, Colleges

Sponsor Guidelines

- Terms and Conditions
  - Eligibility requirements
  - Cost allow-ability
  - Award limits
  - Re-budgeting and Carryover
  - Reporting Requirements

## The Best Customer Service Offices

Have procedures that work  
&  
Have people who care

\*\*Average organizations have one

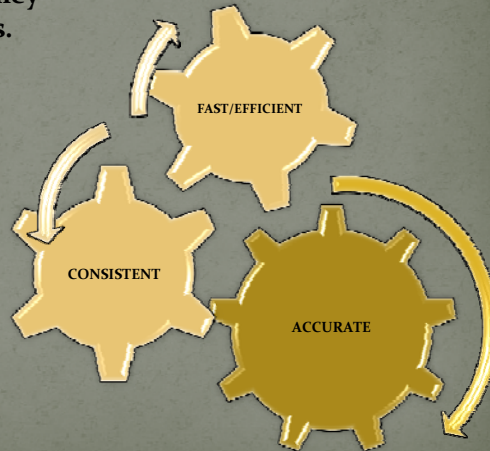
\*\*Poor organizations have neither

Source: Sharon Barlass, Creating Customer Service Champions

## Procedures that work

Customers want to know that we know what we are doing and they want to know they can trust us.

**Are we FAST,  
EFFICIENT,  
ACCURATE &  
CONSISTENT?**



## People who Care

Level of  
Interest

Apathetic?

Concerned?

Amount of  
Warmth

Aloof?

Friendly?

Degree of  
Sensitivity

Abrasive?

Tactful?

Source: Sharon Barlass, Creating Customer Service Champions



“The Quality of our Work depends on  
the Quality of Our People”

-unknown

## How to get people to care?

- Seek service oriented people in interviews
- Iterate to staff that customer service is a priority
- Train staff in customer service skills
- Let staff know that they can seek answers from you and others in the office (give them the resources)

## Mission Statements

**What is a Mission Statement?**

**What does a good mission statement include?**

1. Who?
2. What?
3. How?

**What are qualities of an effective mission statement?**

## Customer Service Expectations

### Do Less

- When we do less than our customers expect - we get unsatisfied customers

### Just Do

- When we do exactly as our customers expect - we get satisfied customers

### Do More

- When we do more than our customers expect - we get ecstatic customers

How can we meet everyone's expectations, when they're often so high?

Magic Strategy – **Under Promise and Over Deliver**



“ Here is a simple but powerful rule -  
always give people more than what  
they expect to get.”

-Nelson Boswell

## Customer Service Initiative

**Customer Service  
Initiative Model**

Texas Tech University – Service Plus Training





## Timeline

Customer Service  
Initiative Model



Timeline

- A timeline is a linear tool to help track progress, plot milestones and deadlines

Texas Tech University – Service Plus Training

## Quantify

Customer Service  
Initiative Model

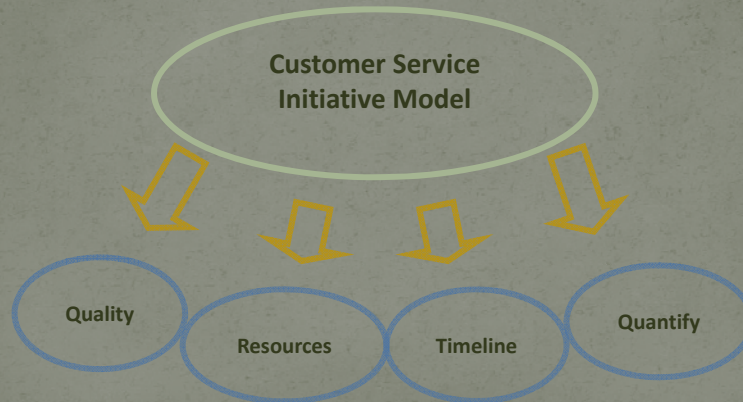


Quantify

- We need a way to measure the customer service we provide. This will allow you to look at continuous improvement

Texas Tech University – Service Plus Training

## Customer Service Initiative



Texas Tech University – Service Plus Training

## Identify Key Customer Service Skills

---

- Non-Verbal
- Verbal
- Electronic
- Do's and Don'ts



## Customer Service Skills

- Listening
- Empathy
- Courtesy
- Problem-Solving Skills
- Follow-up
- Availability

## Listening

- Hearing vs. Listening
- Body Language
- Emotional Awareness and Intelligence
- Active Listening

## Active Listening

Active Listening or Deliberate Listening –Communication technique that requires the listener to paraphrase what he/she hears from the speaker.

Active-

- Defer Judgment
- Do not simply wait to speak, instead listen attentively
- Give feedback, paraphrase the ideas in your own words
- Ask questions
- Eye Contact, Verbal Comments

## Empathy

Empathy is the ability to understand and share the feelings of another.

The action of understanding, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts and experience of another.

Source Merriam Webster Dictionary

## Empathetic Statements

- I can hear how upset you are
- I sense and agree with the urgency of your situation
- I understand why you feel that way
- I would feel that way to if I were you

“ People don’t care how much you know, until they know how much you care”

- John C. Maxwell



## Following Up and Being Available

What is the appropriate time frame for following up?

- To a phone message?
- To an email?
- With an answer to a question?

**What is the office standard or goal?**

## Email Etiquette

- Email Subject Line – Be Concise
- Being Overly Familiar
- Short Paragraphs
- Bullet-points
- **CAPITAL LETTERS**
- Priority Ranking
- Supporting Documentation
- Attachments
- Forwarding
- Copying others

“Our life is frittered away by  
detail. Simplify, Simplify!”

-Henry David Thoreau

## email is not confidential

Do not send anything that you wouldn't write on the  
back of a postcard or want published in the newspaper.



It's likely others could see it, read it, print it, forward it...or publish it.

## Email Etiquette

- Do not respond to an email when angry
- Walk away from the computer
- Talk to a co-worker you trust
- Remember when you hit send, it's gone.

\*Easy way to get a bad reputation.

\*Easy way to make a poor first impression.

“When you change the way you look  
at things, the things you look at  
change.”

-Wayne W. Dyer



## Phrases

### *Deadly*

- You're wrong
- I won't do that
- You have to....
- That's not my job
- But...
- NO
- Let me get this straight...you claim.....

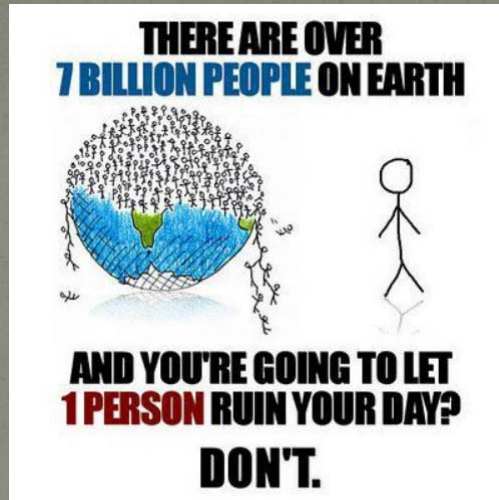
### *Magic*

- How may I help you?
- Thanks for your patience
- Please and Thank you
- We
- I understand
- YES
- I can help you resolve this issue today

## Deadly



## Take Care of Yourself



## Discuss Strategies for Working with our Customers

---

Round Table Discussion

## Discussion and Questions

Melanie Jacobs

Senior Grant and Contract Specialist, RSP Office

UW-Madison

[mrjacobs3@rsp.wisc.edu](mailto:mrjacobs3@rsp.wisc.edu)

Shayne Sims

Lead Analyst, Office of Research Services

Texas Tech

[shayne.sims@ttu.edu](mailto:shayne.sims@ttu.edu)

## Thank you

“To my customer, I may not have the answer,  
but I’ll find it. I may not have the time,  
but I’ll make it.”

-unknown