

PERCEPTIONS & REALITIES

PERSPECTIVES ON SUPERIOR SERVICE AND WIN-WIN RELATIONSHIPS



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Speaker, Consultant, Author

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Specializing in helping
organizations:

- Manage customer expectations
- Deliver superior service
- Improve communications
- Build trusting, supportive relationships

Author of:

- *Managing Expectations*
- *Establishing Service Level Agreements*
- *Communication Gaps and How to Close Them*

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Making a Persuasive Case

Have you ever proposed an important change and those in charge stubbornly refused to back your case? Before adding these apparent obstacle-mongers to your People Who Are Hopeless list, consider whether your inability to persuade them could be because your proposal was one-sided, misdirected, or poorly packaged. To persuade others to support your ideas, keep these points in mind:

Identify the decision-makers. Focus your case on two kinds of individuals: those who make decisions and those who can influence the decision-makers.

PERSUASION SKILLS

Decision-makers are those high enough on the totem pole to approve your recommendations. Influencers are people who have the ear and the respect of the decision-makers and can help you gain their attention. Making your case to anyone else is fine for dress rehearsal, but don't expect them to help you achieve your goal.

Consider the other party's communication preferences. Focus not only on the facts of your case, but also on how you'll present those facts. How do the decision-makers like to receive information? For example, if they prefer it written, crank up your thesaurus and start scribbling. If they favor colorful charts, go for the old red-green-blue. Don't heap tedious detail on those who prefer information concisely stated. Consider what you know about these people, and seek input from colleagues. In persuading others to consider your ideas, how you make your case is as important as the case itself.

Emphasize benefits. Don't advance your case as if your perspective is the only one that counts. People usually want to know why they should care. Therefore, to succeed as a Persuasion Artist, you need to explain how they'll benefit from the measures you're proposing. Take the time to understand their priorities, fears, and concerns. If you're unsure how they stand to gain from your ideas, it might be best to pay another visit to your drawing board.

Take a give-and-get approach. That is, what are you willing to give in order to get what you're seeking? What compromises are you willing to consider to achieve a win-win outcome? Delightful though it would be, you can't count on having everything your way. If you're not willing to do a little giving in order to do the getting, don't waste your time and theirs. Remember, getting some of what you want in the near term is better than getting everything you want in 2096. By then, you'll probably be planning for retirement.

Be a patient persuader. If the measures you're proposing require the decision-makers to commit time, effort, or resources, or a change in policies or processes, go slow. For many people, accepting new ideas takes time, and often more time rather than less. In rare instances, a compelling case will yield an overnight go-for-it. Most of the time, though, you'll find that patience is more than a virtue; it's a necessity. 

MANAGING EXPECTATIONS

Till Dinner Do Us Part

If you want people to meet your expectations, *you have to communicate what you expect*. Otherwise, you could fall victim to a miscommunication. As author of the book, **Managing Expectations**, I should know this by now. *Should* being the operative word.

Meal plans

A year ago, for example, a faraway friend named Jack and I wanted to discuss some ideas while at a conference we were attending. (Jack's not his real name; I want to spare him the ignominy of being the butt of my miscommunication.) As the conference got underway, he said to me, "Let's do a meal together." Great.

A while later, as I passed Jack during a break, I said, "Dinner?" He said fine. When I saw him a few hours later, I mentioned an idea I'd gotten at a session I had attended. "Great," he responded, "That'll be something else for us to talk about when we meet for dinner." Super!

It was customary at this conference for dinner-mates to link up in a first floor lounge between 5:30 and 6:00 in order to be back in time for the evening sessions. At 5:30, I went to the lounge to wait for Jack. I wasn't in any rush. I had a book I was eager to read, and I knew he'd show up by 6:00. Except that he didn't.

Shortly after 6:00, a friend invited me to join a group just leaving for dinner. I declined, explaining my dinner plans. At 6:15, I checked to see if Jack had left a message in my room. He hadn't. At 6:30, another friend returned from an off-site session. I asked if Jack had been at that session. "Yes," he told me, "And they all went to dinner afterwards."

What? Had I been stood up? Forgotten? Abandoned? Maybe Jack's preoccupied, I told myself. He has lots on his mind. While I dined on munchies that I'd stashed in my room, I created a mental list of acceptable explanations for Jack's unacceptable behavior. Surely he'll apologize, I told myself with certainty.

I didn't see Jack again till two mornings later. As I awaited his apology, he said to me, "I don't know if we're ever going to get to dinner together. Something else has come up everyday so far." And he recited the meetings and appointments that had occupied his dinner hours each day. That's when I realized . . .

When I had said "Dinner?" I understood us to be making plans for dinner *that evening*. That was obvious — but I now saw that it was obvious only to me. He, meanwhile,

thought I was suggesting the specific meal we'd have together, not the day. As far as he was concerned, we hadn't yet selected the day. We each had an understanding, but our understandings didn't match.

But *you* said . . .

When something goes awry between two individuals or groups, it's a common reaction for each party to hold the other responsible. Each sees the other as having done something, or having failed to do something, that led to the dissatisfactory result. It's also not unusual, as I proved in this situation, for one party to find fault with the other, when the other doesn't even realize there *is* a problem.

More often than not, the problem is caused by a minor miscommunication. Happily, minor miscommunications are usually easy to avoid. In particular, when you reach an apparent understanding with someone, do what I should have done and confirm that both of you have the *same* understanding. Clarifying what you have agreed to helps to prevent ambiguity, avoid confusion, and ensure you're in sync. If I had simply asked for confirmation of our dinner plans for that evening, I would have learned that we had no such plans!

Ambiguity at work

How can you apply these ideas in your work? For starters, communicate your expectations early and often. Never assume that you and your customers (or staff or management or . . .) have the same understanding of what you've discussed. Ask questions. Check. Then double check. State your understanding and ask if you've got it right.

Whenever you and another party have agreed to take some action, conclude with a restatement of what you've each agreed to. Be sure to leave enough time for this clarification process, so that if you discover differences in your understanding, you can resolve them without feeling rushed.

Jack and I finally got a brief chance to talk the final morning of the conference. I haven't told him about this miscommunication, so he doesn't know that I have forgiven him for (my misguided belief that he was) standing me up. 

For information on my books, **Managing Expectations** and **Communication Gaps and How to Close Them**, see <http://www.nkarten.com/book2.html>.

SERVICE STRATEGIES

Try Something Different

If the way you're delivering your services isn't working, or even if it is, try something different. Otherwise, you'll never know if what you could be doing would work better than what you're already doing.

One way to safely try something different is to conduct tests the way direct mail marketers do. These marketers know that it's too expensive and risky to implement a full-scale change when they don't know if it'll have the desired effect. So they run tests by, for example, sending different versions of their promotional material to different subsets of their customer/prospect list, and seeing which version generates the best response. To apply this idea, consider how you might modify your service strategies slightly with a small subset of customers on an informal, unannounced basis.

For example, try a different way of answering the phone. Instead of answering, "Good morning, service desk," answer every third call with, "Thank you for calling the service desk. How may I help you?" Observe whether the revised wording affects how customers

respond. Or present one of your two-day courses in four half-day sessions and see how it affects enrollments, energy levels, retention, and requests for support. If you're running a client satisfaction survey, print

some survey forms on glaringly bright yellow paper, and see if more are returned than the colorless variety. If the change has the desired effect, you can implement it on a more widespread scale.

There are so many possibilities for things you might try. For example, a customer support group I visited added whimsical clip-art to a set of new customer procedures.

Subsequent questions from customers demonstrated that, unlike with previous procedures, they actually looked at the information. And customers who pay attention to new procedures are more likely to follow them than customers who ignore them. Another group periodically called members of two "test" customer departments just to ask how things were going. Despite no other service changes, the group found department personnel more pleasant to work with.

Of course, the determination of whether these changes are successful is rather subjective, but better to select something that you can assess easily, even if subjectively, than to get bogged down in a thankless, quantitative chore.

If the change has no impact, that's fine; after all, you haven't invested in a colossal change that accomplished nothing. And if the test backfires, say by upsetting or confusing some customers, you can recover more gracefully than if you had invested significant time and money in it.

There's a side benefit of doing something different, especially if you're the sort of person who gets bored doing things the same old way repeatedly. Taking a new approach can keep you from getting into a rut. Or it can help you get out of a rut



if you've taken up residence there.

Make it a challenge. Add a what-can-we-try segment to your staff meetings. Do some brainstorming. Deciding what to change is half the fun, and you'll be amazed at the imaginative ideas you'll come up with. And if your test backfires, you can always play dumb. Glaring yellow survey forms? Strange. Wonder how that happened.

SERVICE LEVEL AGREEMENTS

The Reviews Are In

Everyone complains about too many meetings. Yet, sometimes the problem is too few meetings. For example, some providers rarely meet with their customers except when a serious problem has occurred. Periodic meetings to assess service effectiveness and improve service delivery may not occur at all.

Service level agreements (SLAs) counter this tendency not to meet by incorporating provisions for regularly scheduled periodic reviews. These reviews provide a forum for assessing and improving service adequacy. The result? Problems are trapped before they turn into crises, and molehills never attain mountainhood.

In my experience, it's wise to hold periodic reviews at least monthly when the SLA is new, service delivery has been subpar, the parties have previously experienced major conflict, or the service context is undergoing significant change. When relationships and service delivery have been satisfactory and stable, quarterly reviews may be adequate.

Articulating review objectives

A well-written SLA documents the objectives of the periodic review to emphasize the commitment of both parties to systematically discuss service effectiveness. The objectives, which are adapted from my handbook, **How to Establish Service Level Agreements**, and which you are welcome to plug into your own SLA, are:

- To review service delivery since the last review
- To discuss major deviations from service standards
- To resolve any conflicts or concerns about service delivery
- To re-evaluate services in light of current business needs and resources
- To discuss changes planned or in progress to improve service effectiveness
- To negotiate changes to the SLA document

For an excerpt from **How to Establish Service Level Agreements**, see <http://www.nkarten.com/book2.html>.

STAFFING

Think About a Time When . . .

How can you know if the people you're hiring are the right ones for the job? Sometimes it's possible to observe how applicants handle actual or simulated work activities. More often, though, interviews are your primary means of sizing them up. Yet, most applicants arrive armed with the "right" answers to your interview questions. Therefore, if you ask, "How well do you get along with people?" even the geekiest know how to respond.

Suppose, though, that you supplement the usual job-specific questions with questions that have no obvious "right" answer. Questions such as the following will give you insight into the applicant's attitudes and thought processes, resulting in much richer information for assessing applicant suitability.

- Think about a situation in which you were stymied by a customer's problem. How did you handle the situation and what did you learn from it?
- Recall a situation in which you were under intense pressure, and describe how you handled it.
- What's your reaction to the common complaint that customers don't know what they want?
- What do you especially appreciate about yourself?
- In what ways did your education fail to prepare you for your career?
- If you are selected for this position, what would you need to accomplish and within what timeframe in order to feel successful?

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