

# Creating a Culture of Customer Excellence

Defining Customer Excellence in the FM industry, and embedding behaviours in a financial services client.

## OVERVIEW

**peoplewise** was involved in the Customer Excellence Behaviours (CEB) project since its conception, and undertook a key piece of research to identify the critical behaviours that drive customer excellence across the CRES FM and the wider industry.

As an outcome of this research, a number of initiatives were launched under the Pillars of Customer Excellence Framework aimed at creating a value proposition of outstanding customer excellence in the FM market, grounded in research and best practices, that could be applied across the talent and customer lifecycles. **peoplewise** was then commissioned to design and deliver a number of solutions that would embed and cascade the Customer Excellence Behaviours into the culture and 'way of doing business'

### These solutions included: :

- » Internally and externally validated Customer Excellence Behavioural Model
- » Customer Excellence Performance Management Tool
- » Customer Excellence Interview Tool
- » Customer Excellence Training Roll-out

Ongoing data outputs and metrics from these solutions have been used to support the customer lifecycle, from inclusion in bids to implementation and quality assurance of FM contracts.

## WHAT WE DID

The development of the GWS Customer Excellence Behaviours Model was initiated in response to enterprise-wide 'Voice of the Customer' research, which identified the fundamental requirements for great customer service, and was followed by a 'behaviours ranking exercise' to determine the core behaviours that lie at the heart of customer service operations in the facilities management industry.

Having identified 13 core customer excellence behaviours, **peoplewise** was invited to define, validate and benchmark those behaviours to ensure they were all highly relevant and robustly anchored in the concept of delivering a first class customer service experience.

Figure 1. Customer Excellence Behaviours



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## Step 1 – creating the framework

To validate the core customer excellence behaviours we did the following:

1. **Externally validated** the identified behaviours against the FM and wider market, including peer-reviewed literature, organisations known for demonstrating best practice in customer experience domain , and international institutes renowned for their specialism in this domain
2. **Internally benchmarked** the identified behaviours with key leadership stakeholders to form a meaningful, relevant customer excellence model that could be flexibly adapted to suit customer expectations within the primary customer service delivery environments and market sectors.
3. **Externally benchmarked** the identified behaviours with key customer stakeholders to ensure that the behaviours were relevant, desirable and offered market differentiation.

Following the validation process, we mapped the model to the wider company-wide competency framework, and created the behavioural indicators and behaviourally anchored rating scales. This ensured the framework could be applied in a fair, standardised and transparent manner to produce metrics and solutions that would identify, develop, engage, train and performance manage talent, thus ensuring the delivery of world-class customer experience in the FM industry.

## Step 2 – creating the tools

A number of tools were created to allow the organization to apply the Customer Excellence Framework across its talent and customer lifecycles,

1. **Performance Management Tool.** Designed to provide specific behavioural guidance on the expected Customer Excellence behaviours required to deliver high performance, with specific guidelines to ensure each individual's performance is evaluate fairly and objectively, with structured development discussion and future performance goals.

“ I think this is a fantastic tool and really brings focus on looking for the right behaviours in our people”

**Global Business Director**

2. **Interview Tool.** Designed to provide a rigorous, fair, valid, reliable and flexible framework to interview and compare candidates based on key success criteria in primary customer delivery environments.

“ The interview tool is very useful in terms of bringing the interviewer an awareness of the importance of these behaviours which are key to lead our operations to successthis is a fantastic tool and really brings focus on looking for the right behaviours in the people we chose ”

**Account Leader**

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**3. Training** The company designed a training programme for roll out across their Asian locations, in partnership with a financial services client. The aim of the programme was to engage employees from both companies in learning the mindset behaviours and models that demonstrated outstanding customer excellence. We were selected to provide the delivery solution for this training.

## Step 3 - embedding the change

The training project was delivered over 12 months across 11 countries in Asia – Hong Kong, China, Singapore, Vietnam, Philippines, South Korea, Australia, Indonesia, India, Malaysia and Dubai – using **peoplewise** faculty. Delivery took place in multiple languages, including English, Cantonese, Mandarin and Bahasa. At times, delivery was co-facilitated with internal L&D staff, which involved a degree of upskilling to equip these staff for the delivery, and in doing so develop internal capability.

Challenges of the project included the logistics of arranging and delivering a globally standardised training across multiple countries and languages, including the cultural nuances of the Asian countries. The **peoplewise** team worked closely together and with the client to ensure consistency of standard across the delivery, and that all personnel were fully

equipped. This involved central coordination and in-depth training out of our London and Singapore offices. An additional challenge was the announcement of the company's divestiture mid-project. This had a destabilizing effect on the audience, who were faced with uncertainty about their own future in the organisation, meaning that the **peoplewise** faculty had to manage that in real-time and give space to those discussions, in order to ensure that people were receptive to the learning, whilst maintaining the integrity and standard of the programme.

## OUTCOMES

Polls, qualitative data and quantitative data demonstrated that delivery and knowledge transfer remained at an outstanding level across the programme, and qualitative results indicate a greater "living and breathing of customer excellence" across both organisations as a consequence of the training. The project took place in two phases, and the second phase was commissioned based on the strength of the success from the first phase.

Outputs and metrics from the interview and performance management tools continue to be applied to inform bids, implementation and quality assurance of FM contracts and is viewed as a key market differentiator.

**peoplewise** is one of the world's leading business psychology organisations. Every day it enables change in individuals, teams and organisations, transforming from the inside out.

Its primary focus is to promote strategic growth and change at all levels of an organisation, by combining psychological insights and evidence-based best practice with a comprehensive appreciation of an organisation's business goals. It does this by designing and delivering innovative, sustainable cost-effective solutions that deliver.

**peoplewise** has expertise in human behaviour, strategic organisational research, change management, leadership assessment & development and research methods.

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