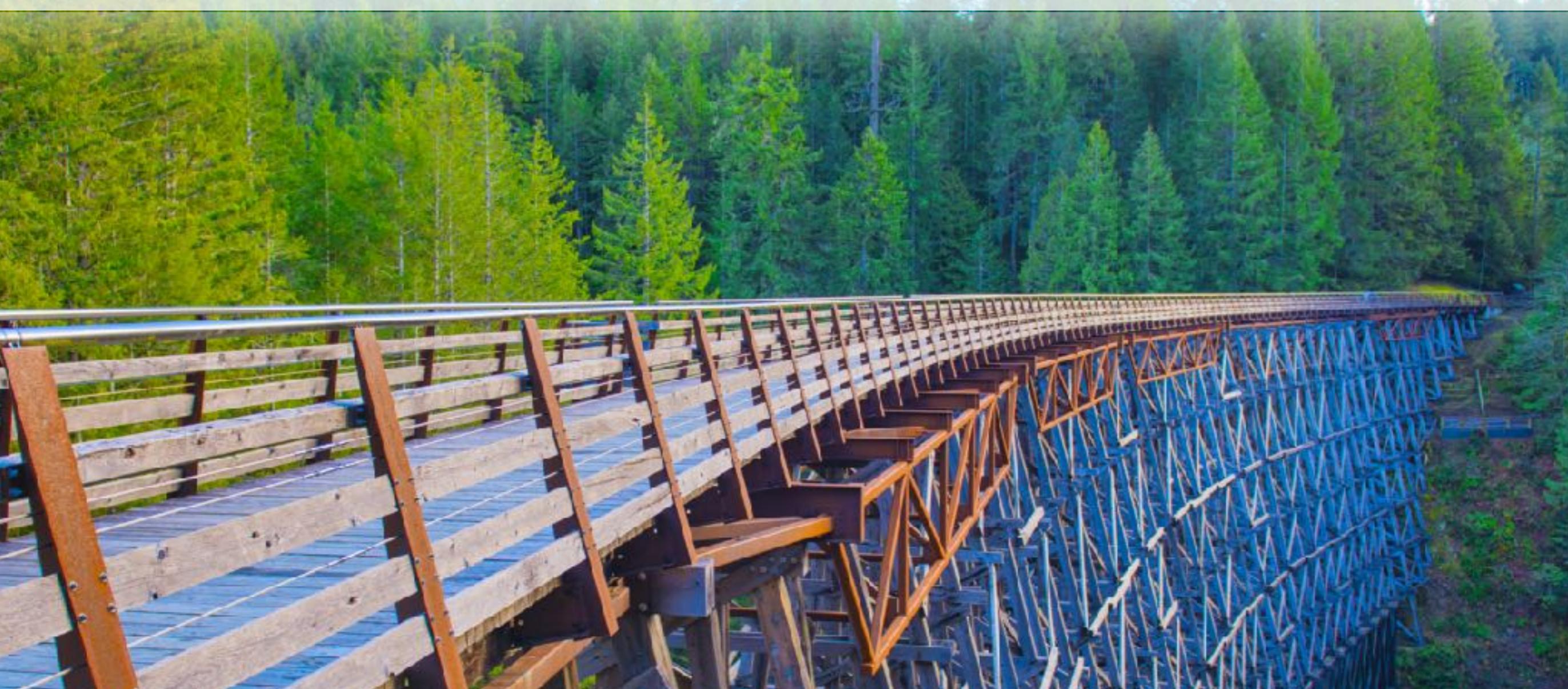# Customer Service

Show your clients that your company has built a safe bridge to span the gap between "Here, take my money" and "Here you are, sir. Have a great day."

© Robert Ross 2020

HIGHLAND Ross
BUSINESS COACHING

Bob Ross
Certified Professional Business Coach

AN ALL-TOO-REAL STORY

Consider how much lost opportunity for goodwill and additional revenue your business might be forfeiting through poorly-designed customer service.

A few Saturdays before his prom, our son went into a flower shop to order a corsage for his date. He was eventually greeted by a clerk, and after an awkward exchange, he finally stammers out he needs a "croissant" for the prom. After a comedic exchange and abbreviated selection process, the shopkeeper rang up the sale, took his credit card, gave him the receipt, and said: "thank you." That's it. End of transaction; end of conversation. My son awkwardly says thanks and shuffles out of the shop.

My son goes back to the flower shop the morning of the prom to pick up his corsage. After another awkward exchange, the shopkeeper cannot find his order and asks if perhaps he came to the wrong flower shop. No, I came here. Well, do you have your receipt? Well, uh, maybe, no. He leaves the shop dejected and empty-handed.

My wife then went to the flower shop to show proof that our boy did indeed visit this shop and paid for a corsage. The shopkeeper finally finds his order, stuck to the back of another order. After yet a third trip that Saturday morning, my son finally has his corsage in hand to present to his date.

What If?

What a customer service disaster. What if, instead, the shopkeeper took great pains to explain to my son what happens next in the corsage-fulfillment process?

What if she had made a big deal of explaining the importance of the receipt?

> *"Now, be sure to hold onto this receipt. On the morning of your prom, bring this receipt. This receipt is how we will be able to make sure we give you just the right corsage you ordered for your date."*

What if part of her expectation-setting process had involved ceremoniously putting her copy of the order form into a big, industrial see-through job ticket jacket and placing it in an area labeled "New Orders"? Could that simple act have subtly conveyed to my boy that her flower shop is "all over it"? Could that have also prevented her from LOSING THE ORDER SLIP?

Highland Ross

A BRIDGE TO CONNECT SALES AND ORDER FULFILLMENT

Develop and implement customer-facing and internal support structures to instill in your newly-acquired clients a sense of confidence.

Most small businesses invest and otherwise give attention to their sales processes. Many companies, similarly invest in designing their order fulfillment processes. Most small businesses, however, do not give enough attention to bridging the gap between their sales platform and order fulfillment platform. This inattention gives newly-earned customers anxiety; it leaves customers wondering what they've just gotten themselves into. Small business owners also forfeit goodwill, additional revenue, and repeat business.

How can small businesses do a better job of bridging the gap between their sales and order fulfillment teams?

The small business should develop and implement customer-facing and internal practices to instill in their new clients a sense of calm that their order is in good hands. By implementing enough customer-facing tactics and internal tactics, the small business can build a safe bridge for its clients.

Imagine a train trestle bridge spanning a canyon with crisscrossing support beams. Some of your customer-facing tactics might extend deeply into your internal operations. Likewise, some of your internal processes might extend deeply into your sales platform. These "beams" support a structurally-sound platform, your customer service platform.

You can build such a safe platform that the client doesn't even realize they've crossed a gap at all. Let's take a look at some customer-facing and internal concepts that can help your company build its bridge.

CUSTOMER-FACING AND INTERNAL BRIDGE SUPPORTS

Here are just a few ways you can build a safe bridge to help your clients span the gap from "I'm ready; now what?" to "Here's your order. Please come again."

Customer-Facing Bridge Supports

New Customer On-Boarding / Intake Process

Your Proven Process

Questionnaire

"What to Expect" Document

Frequently Asked Questions (FAQs)

Order Forms

List of Attendant Services

Visual Timeline / Lead-Time Calculator

Orderly Office / Store / Shop

Order Status Inquiries

Mistakes and Delays

Solid Follow-Up

Spirit of the Rule

Billing and Collections

Internal Bridge Supports

Production System Software

Order-Taking Process

Error-Proofing Devices

Work Orders / Job Tickets and Work Order Boxes / Job Ticket Sleeves

Regular Work-In-Process Meetings

Metrics

Training

Highland Ross
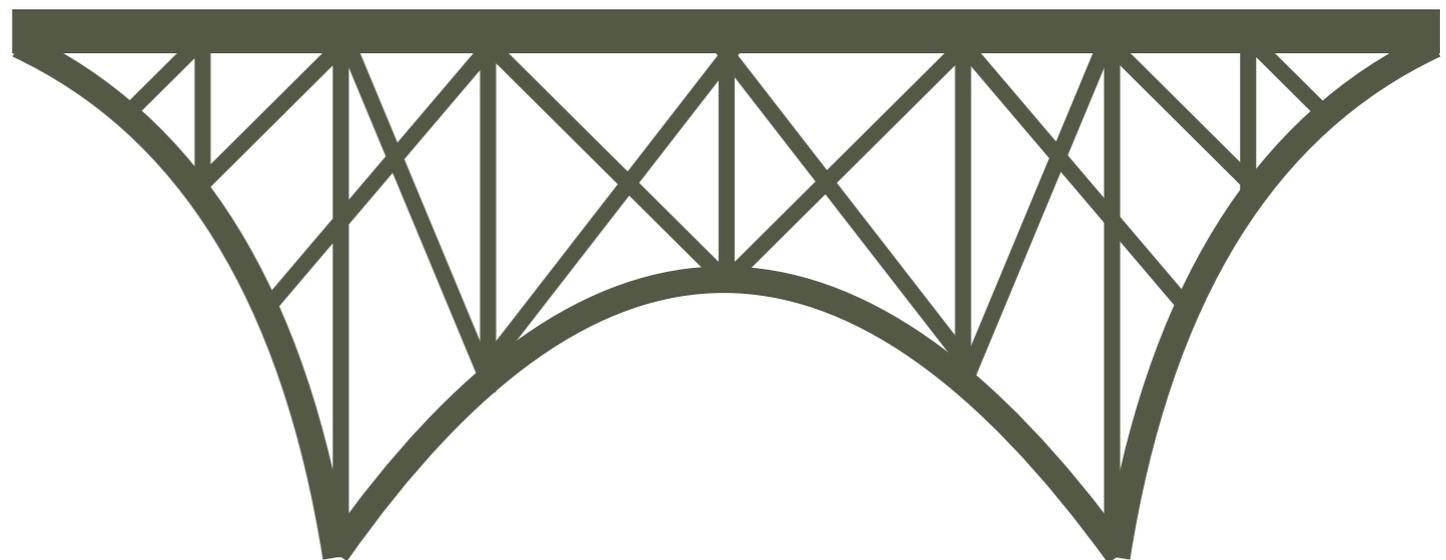
ONE IDEA BEFORE WE JUMP IN - MAKE YOUR IDEAS VISUAL

Taking the time to depict your ideas visually can be a powerful clarifying exercise.

"Epiphanies and profoundly moving experiences come from moments of clarity. Think like a designer and guide your audience through ideas in a way that helps, not hinders, their comprehension. Appeal not only to their verbal senses, but to their visual senses as well."

- Nancy Duarte

Help your audience (prospects, new clients, and employees) SEE what you are saying.

Humans are sight (vision) dominant. 30% - 40% of our cerebral cortex is devoted to vision, as compared to 8% for touch or just 3% for hearing.

A diagram is a good way to illustrate how parts of a whole interact. It is nearly impossible to communicate today without using shapes to symbolize various types of relationships and how they interact with one another.

Source: Slide:ology by Nancy Duarte

CUSTOMER-FACING BRIDGE SUPPORTS

Help your front-line team adequately set expectations
and gather just the right amount of information.
Build visual elements into each of these supports.

HIGHLAND
Ross ®

BUSINESS COACHING
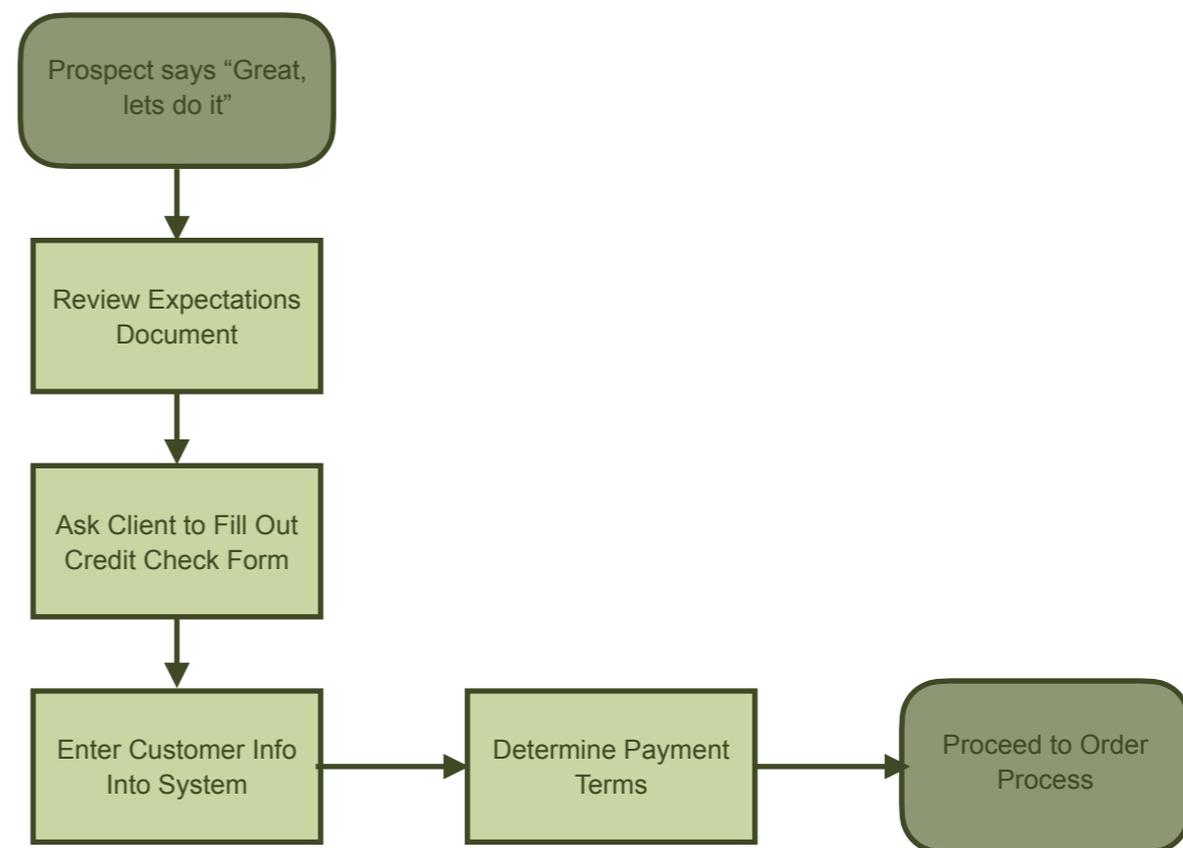
NEW CUSTOMER ON-BOARDING / INTAKE PROCESS

Immediately go into your customer on-boarding process as soon as your newly won client says "Yes".

Literally, AS SOON AS THE CLIENT SAYS "YES", with the client still standing there.

Every person who speaks with customers in your company must know how to handle this first step impeccably. Do not say, "great, let me point you to a guy in the next department over, and he'll take care of you." Consider building some of the ideas which follow into your intake process. Then, train everyone who interacts with prospective customers on this process.

Here is a sample intake process. Develop a detailed process, with action steps, and scripts within (for) each box. This documentation should be part of training new employees. You should also include it in your Operations Manual.

```
  ┌─────────────────────┐
  │ Prospect says "Great,│
  │    lets do it"      │
  └──────────┬──────────┘
             │
             ▼
  ┌─────────────────────┐
  │ Review Expectations │
  │     Document        │
  └──────────┬──────────┘
             │
             ▼
  ┌─────────────────────┐
  │ Ask Client to Fill Out│
  │  Credit Check Form  │
  └──────────┬──────────┘
             │
             ▼
  ┌─────────────────┐   ┌─────────────────┐   ┌─────────────────┐
  │ Enter Customer  │──▶│ Determine Payment│──▶│ Proceed to Order│
  │ Info Into System│   │     Terms       │   │    Process      │
  └─────────────────┘   └─────────────────┘   └─────────────────┘
```

YOUR PROVEN PROCESS

Create a simple illustration to explain to prospective clients the major touchpoints between him and your company.

If your business is more relational, service-oriented, in an unfamiliar industry or hard to describe, consider creating "Your Proven Process."

This great idea comes from Gino Wickman, in his book, Traction. "Your Proven Process" is a one-page visual to illustrate the relationship your company has with its clients, from the moment of your first interaction with them to the ongoing follow-up once you have provided the product or service.

Wickman states that there are typically three to seven major steps in a company's proven process. Creating a standard "proven process to use as a sales aid will increase your prospective customer's confidence in doing business with you. Showing a new customer such a "customer journey map" also ensures they know exactly what to expect.

"Rather than giving them a sales presentation and inundating them with information, you're saying 'let me *show* you exactly how we are able to accomplish great results for our customers. We have a proven process that we follow.'"

Wickman makes the point that this can also help your organization internally by helping each employee understand how his or her role affects the customer. I want to offer one practical way to expand this idea:

Your company's "proven process," illustrated, should accurately reflect how the company thinks about itself and the value it creates for the client. We don't want the folks on the operations side of the bridge to scoff at this illustration ("this is what the sales department tells customers we do").

Instead, your proven process should so closely reflect your company's way of doing things that it is only natural that the sales team uses it. See the difference?

Wickman intends Your Proven Process to be a sales tool, but determining where in the sales process to pull it out depends on many factors.

Done well, your team can use Your Proven Process as a natural segue when the prospective customer first says yes.

"That's great, before we get going on the paperwork, I'd like to show you how our company operates."

I have included a sample illustration on the following page. I encourage you to google "proven process" and "customer journey" for more ideas.

Sources: Traction, by Gino Wickman and Get A Grip by Gino Wickman and Mike Paton

YOUR PROVEN PROCESS ILLUSTRATION
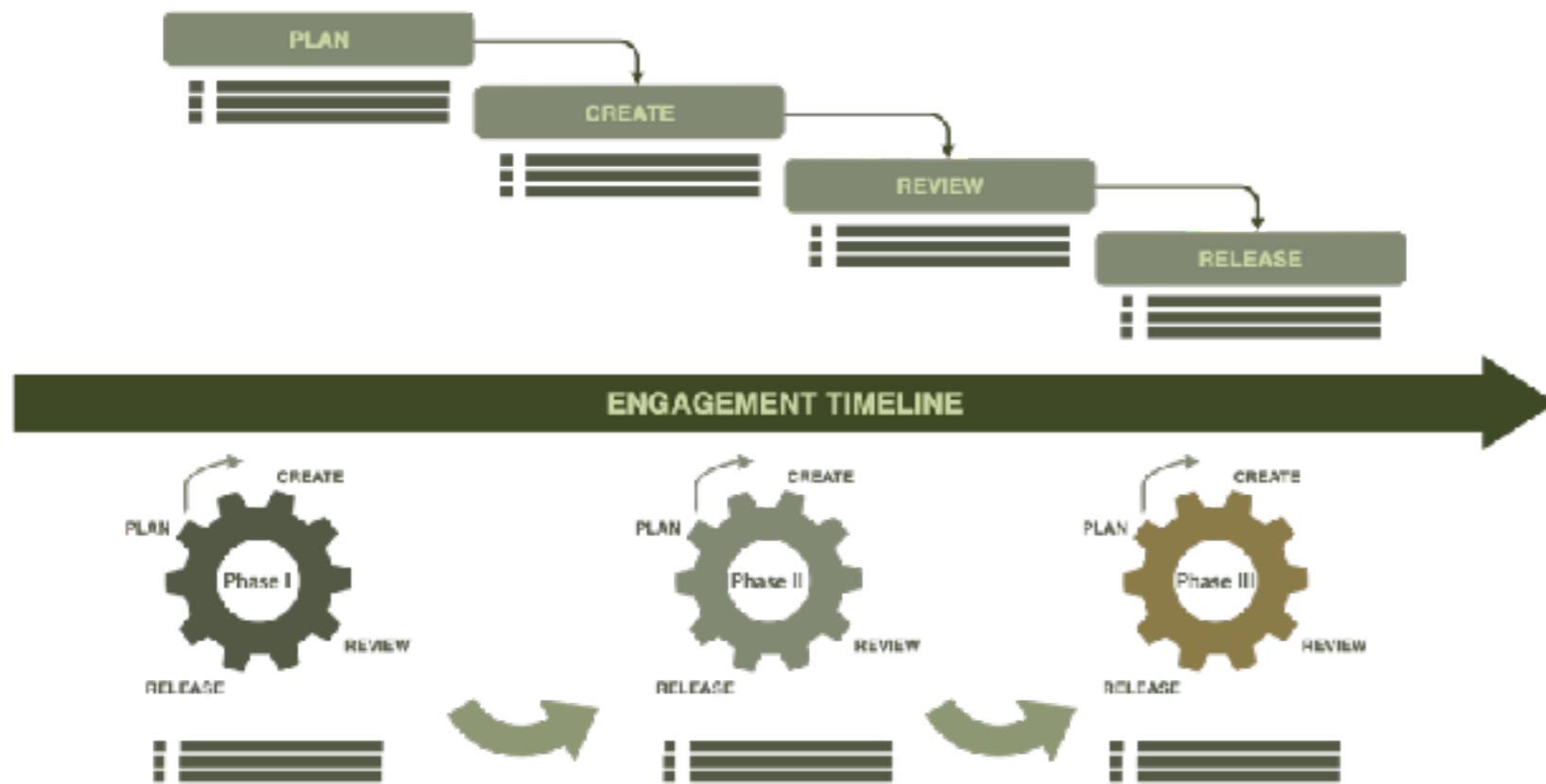
"A diagram is a good way to explain how parts of a whole interact. It's nearly impossible to communicate today without using shapes to symbolize various types of relationships and their interactions."

- Nancy Duarte

QUESTIONNAIRE

The simple act of filling out a well-designed survey can give your new client a solid sense of confidence that your company is thorough.

Your questionnaire should help the customer think about areas tangential to the current order, but not yet explored. It can also capture information to help the client, and you better understand their usage patterns and intended uses. Design your survey to help your client gain a new level of self-awareness about her overall needs.

The questionnaire differs from the order form in that the questionnaire seeks to discover broader understanding of the client's needs and goals, as well as their main purpose for engaging your services in the first place. Their main purpose may not be obvious even in simple transactional businesses such as retail or the trades. Their purpose may be even less obvious for businesses that aren't as tangible.

Take care that such a tool isn't manipulative or pushy. Instead, design it to be genuinely helpful.

"WHAT TO EXPECT" DOCUMENT

Similar to Your Proven Process, this document describes in more detail the milestones of each step in your process, and even when to expect those milestones to occur.

As the name implies, this is a document to help your team properly set expectations for that critical first order.

Depending on the complexity of your business, you may consider drafting a document that sets out reasonable expectations over the life of the order.

Your "What to Expect" document might explain the nature of communication between the client and you at each step. Yours may even set boundaries to prevent your client from wringing his hands in your office every day.

As an example, the printing, sign/banner, and embroidery industries typically utilize a proofing process whereby the firm prepares a "proof" or mock-up of the design. The client must sign-off on the proof before before the firm will send the order into production. This process catches many typographical errors, prevents quality and goodwill issues once the jobs are delivered, and saves much production time and cost.

Continuing this example, your document might explain the proofing process, when to expect the first proof, and what the customer should do with the proof once they receive it. The document would make it painfully clear that the "stopwatch has stopped" since the order is now back in the customer's hands. For this reason, the customer should give the proof the timely attention it needs.

Further, you might set the expectation that, if the client caught an error, you will have to start the process over again.

Finally, in this example, the "what to expect" document would outline the typical lead-time once the proof has been approved.

FREQUENTLY ASKED QUESTIONS (FAQS)

A well-curated list of questions that are likely to come up will help you train your front lines in becoming more knowledgeable and responsive.

First, track the questions your clients ask along the way.

Jot them on a notepad on the counter, or your desk. Make tick marks when a different client asks the same or similar question. Keep this list growing for a couple of months.

Then, compile this list of items with the most frequent at the top. Then write your answers thoroughly. Your FAQ document might be two to four pages long.

Consider color-coding the questions to correspond with the steps in your proven process and what-to-expect document.

Do not start inside your mind. I'm always amazed to see FAQ documents related to brand new or even to-be-launched products. Those cannot, by definition, be FAQs; they are semi-relevant lists thought-up by marketing types.

ORDER FORMS

Customers expect a company to fill out order forms and provide acknowledgements and may become uneasy in the absence of such forms.

Order Forms

The simple act of filling out a form with order details and customer contact information forces your front lines to ask questions of the customer. This simple form of listening demonstrates your company's thoroughness in capturing al the relevant information.

For this step, it makes little difference if you enter the information into your computer system or fill out a paper form. If your company uses paper forms for this step, please consider using a bright color paper (not white) to make them just that much more visible (and less likely to get lost).

Your order form should capture all the information the order fulfillment team needs to build the order accurately.

Order forms differ from questionnaires in that they collect information related to the current transaction only.

Receipts and Acknowledgments

Once they have said "yes, let's proceed" most customers don't like to leave a business empty-handed. Either they leave with a physical product, or they have some type of proof the conversation happened, that they placed an order, and even that money changed hands.

Even with online orders where the customer fills out al the fields, with credit card information, they like to see two very specific things when they hit the "submit" button:

- An immediate pop-up acknowledgement with some type of congratulations

- A receipt to follow very shortly after via email

Face-to-face transactions should always close with providing the customer with a receipt, a deposit receipt, or some other type of order acknowledgement, whether paper or electronically.

LIST OF ATTENDANT SERVICES

Ensure the customer will have everything they truly need to complete their project when your company fills the order.

Your customer has a purpose for coming to your business for your product or service. The thing your company provides fits into your client's larger project, task, or need. You probably already know much about the larger project.

Prepare a list of common services and products, in addition to THE MAIN PRODUCT which your client likely needs to complete his larger mission.

Casually ask the client if they might need one or two of the other things to go along with the original item or service.

If your business does not provide some of the more obvious items on such a list, have a list of friendly business neighbors who are able to provide those items. By doing so, you will cultivate relationships with complementary businesses. By referring naturally complementary and friendly businesses to your clients, such businesses are more likely to refer *their* clients to *you. More to the point, though, you will have better served your client in that moment.*

Avoid pushy sales tactics. Car repair shops have become notoriously aggressive, as have some marketing and financial services companies. Be genuinely helpful.
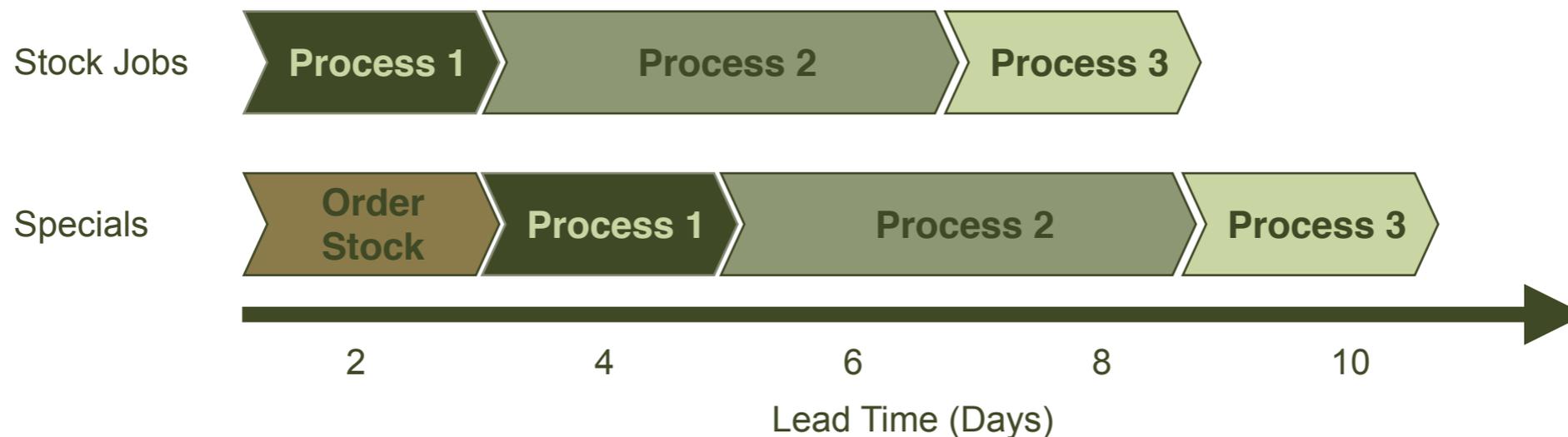
VISUAL TIMELINE / LEAD TIME CALCULATOR

Equip your front lines to answer the question "how long will it take" with a visual tool.

One of the questions frequently asked is undoubted "how long will it take." Your answer is likely to be "well, it depends." Create a visual lead-time calculator which shows, in days, a few of the most common scenarios. Put a timeline across the top or bottom. Include for each situation, the significant processing steps, and milestones.

By drawing each major step to the time scale, you will provide your client with an excellent visual answer to the question "how long."
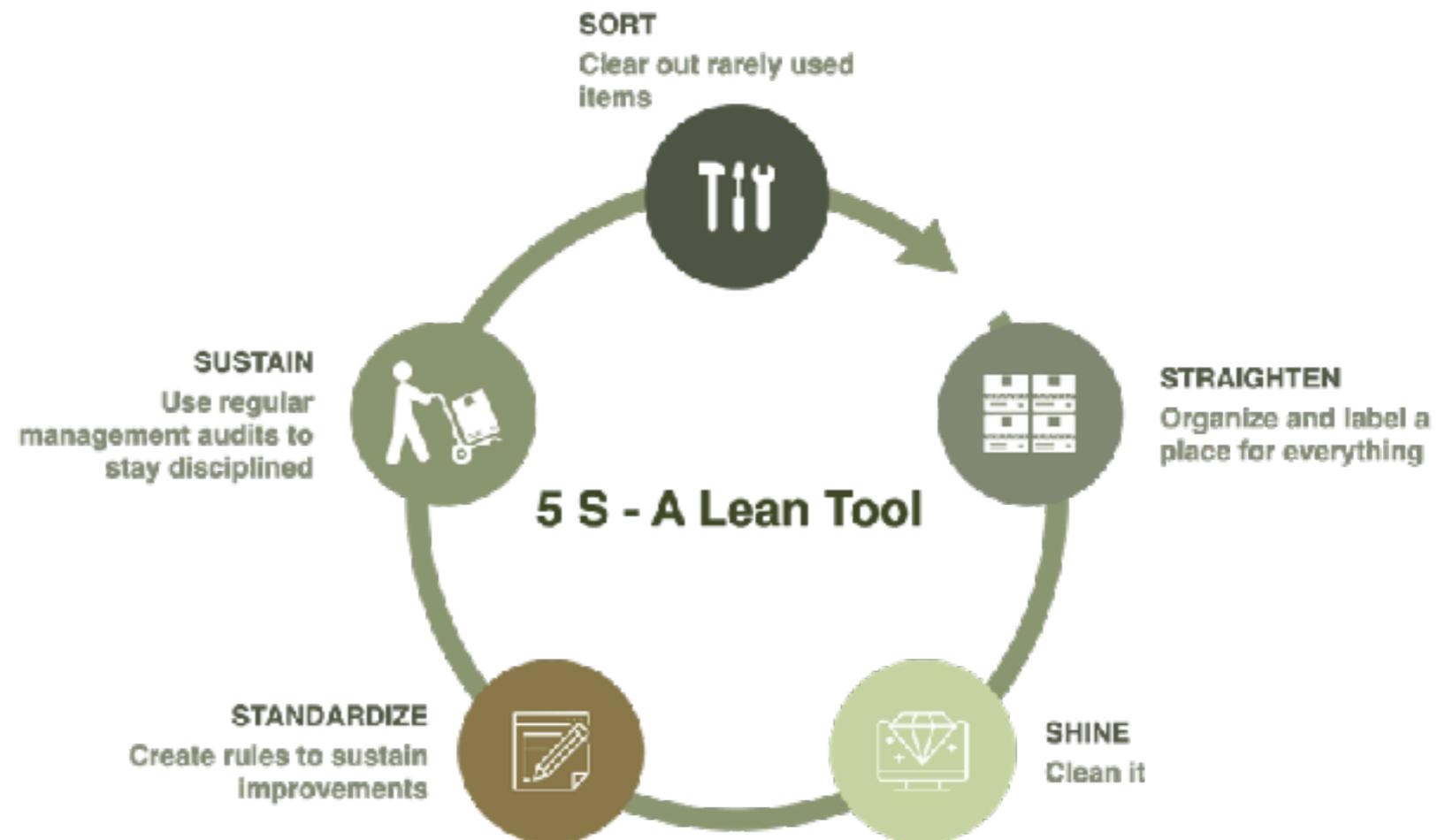

Stock Jobs: Process 1 → Process 2 → Process 3

Specials: Order Stock → Process 1 → Process 2 → Process 3

Lead Time (Days): 2 4 6 8 10

ORDERLY STORE / SHOP / OFFICE

Your business should visually convey to your customers that they are working with a top-notch establishment.

Your place of business should embrace the philosophy of "a place for everything and everything in its place." Ensure that your customer-facing employees have the tools (such as THESE tools in THIS document) they need to interact with your clients and prospects professionally. Guard against piles of papers in various states of completion and clutter in all forms. Of course, your customer-facing areas such as lobbies and showrooms should also be clean; ensure that these spaces are free of trash, stains, or distracting smells.

The concept of 5S comes from the Lean Manufacturing body of work. It offers a simple process for tidying up any workspace, whether a manufacturing shop floor, office, lobby, and even a car / mobile office.

SORT
Clear out rarely used items

STRAIGHTEN
Organize and label a place for everything

SHINE
Clean it

STANDARDIZE
Create rules to sustain improvements

SUSTAIN
Use regular management audits to stay disciplined

5 S - A Lean Tool

ORDER STATUS INQUIRIES

Ensure that your customer service people and your website can quickly offer order status updates. Make it easy for customers to perform their own queries.

Customers frequently need to know the status of their orders even though you set their expectations, AND things are progressing as planned. You might think to yourself, "everything is going fine; there's nothing to report." You might be right, but your client may feel anxious, particularly for long lead-time items. So they may contact you.

If your information system requires some identifier such as order number, highlight that order number with the client at the time of purchase. Explain that they should keep that number handy should they need to check order status.

MISTAKES AND DELAYS

Foster a culture of owning errors and delays and of cascading the information quickly.

As soon as your company discovers a possible delay in an order, employees must cascade that information quickly and proactively to the customer. Equip your employees with the operating principles to ensure excellent, balanced customer service. Develop (and train on) decision rules on whether and when to offer price concessions.

It is one thing to tell employees to quickly and proactively take ownership of mistakes and delays. It is quite another to build such a philosophy into the fabric of the culture such that your employees feel safe in owning a problem.

One mantra popular in quality circles is "attack the process, not the people." Another related slogan is "there are no bad people, only bad processes."
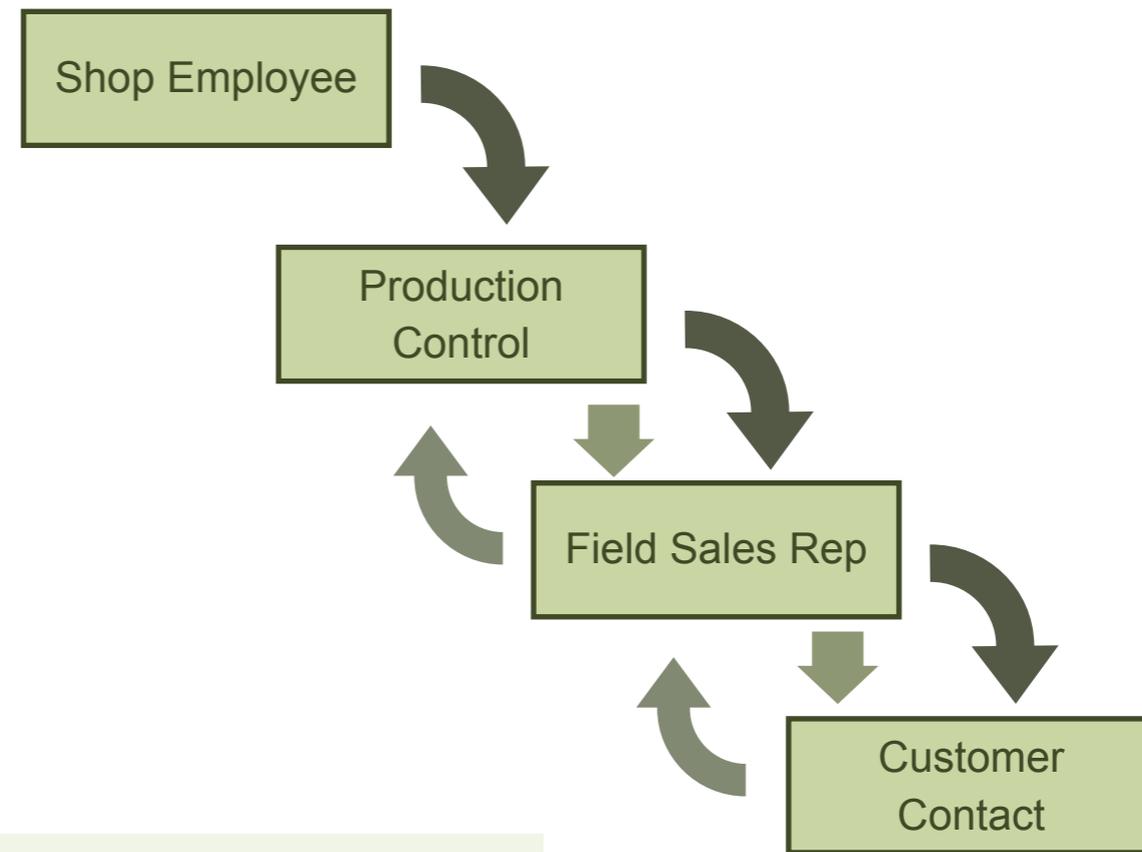
Ensure your culture properly balances sound customer service principles, timely troubleshooting, the human equation, and cost.

Shop Employee → Production Control → Field Sales Rep → Customer Contact

SOLID FOLLOW-THROUGH AND FOLLOW-UP

Honor even the tiniest of promises, such as "I'll call you when the material comes in."

Sales professionals, as a class of people, are generally very good about using a system to ensure they follow up with prospects. Most other people in the business world struggle greatly with follow-up. Learn everything you can from sales professionals about how they prevent opportunities from falling through the cracks.

Follow-Through means honoring commitments, even seemingly insignificant ones; doing what you say you will do.

Follow-Up means circling back to someone who owes you some input.

Create (or purchase) a system that allows you to know when the customer "owes" you a call for clarification on a particular order.

Don't let orders languish in a "customer pending" state for very long.

It would be poor service to have let an order sit in a pending state for three weeks because your company was waiting on additional input from the customer, and then the customer calls to find out why he hasn't received the shipment yet.

This works internally, as well. If Joe from Production was tasked with determining whether the shop can produce an item to the dimensions a customer specified, make sure Joe doesn't forget that task.

SPIRIT OF THE RULE

Make sure your employees understand the guidelines as well as the underlying business principles driving a policy.

Communicate whatever principles , policies, and procedures are considered essential to getting desired results. Mention as few procedures as possible to allow as much freedom and flexibility as possible. Organizational policy and procedure manuals should be brief, focusing primarily on the principles behind the policy and procedures. Then, as the circumstances change, people are not frozen - they can still function, using their own initiative and good judgment and doing what's necessary to get desired results within the value framework of the company.

- Stephen R. Covey, Principle-Centered Leadership

Build-A-Bear earned some negative press recently when a customer service agent refused to honor a coupon for a couple. The couple's child had just passed away, and they wanted a stuffed animal to honor the child. The customer service representative very politely told the couple the child must be present. The company should have trained the ins-and-outs of the coupon policy as well as some basic customer service principles.

I use the phrases "underlying principle" and "spirit of the rule" interchangeably. If you place too much focus on the policy (the rule), your team will become legalistic. They will focus on the "letter of the law" instead of the "spirit of the law."

Raising children is similar. To keep kids from constantly pushing the boundaries and parsing words, parents are wise to teach their children the principles behind what they say.

As an example, a parent might be horrified to catch their small child throwing rocks at the neighbor's dog. The parent might say (or yell) "don't throw rocks at dogs!" If the parent doesn't teach the underlying principle (in this case, "respect life" or "animals are precious"), the parent should not be surprised to catch the child kicking the cat the following week.

Teaching the principle empowers people to raise their level of abstraction from the precise situation at hand to all similar situations.

BILLING AND COLLECTIONS

Credit and Collections processes are an important part of demonstrating you have built a safe bridge, too.

Build Safeguards Into Your Process

Ensure accurate billing (i.e., correct pricing, number of units, customer purchase number, line items).

Ensure your company doesn't automatically generate and send invoices for work not yet completed (unless agreed-to upfront). Make sure invoices are easy to understand and use language that ties back to things covered in Your Proven Process, FAQ's, and other expectation-setting documents.

Define your credit policy

If you need credit "tiers", spell them out. Consider starting each new customer out with cash terms. As the customer grows, you might consider relaxing those terms to something like net 15. Determine whether you need to have the client fill out a credit application, and how to actually follow up on the information provided to make good credit decisions.

Spell it out so that customer-facing employees (especially commissioned sales reps) can properly set expectations.

Develop a Collections System

You must stay diligent in collecting past-due invoices. Train your team members involved in Accounts Receivable and Collections to stay diligent and empathetic, but firm. Equip them with tools to help them in this process. Accounting software can help. Scripts can help, too.

Develop a way to track all conversations and follow-up. *The squeaky wheel gets the grease.*

Develop a way to track repeat offenders. Consider creating a form or Collection Card for each new customer who has a past-due balance. Keep notes and dates from collections conversations throughout the life of the customer on this Collection Card.

USE THESE IDEAS TO COMPLEMENT YOUR MARKETING COLLATERAL

Once you have solid drafts of one or more of these suggested items, hire a professional graphic designer to put the finishing touches on them.
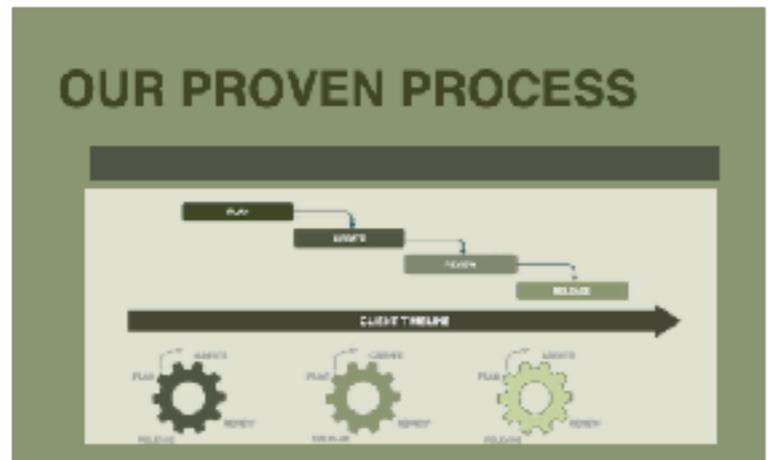
Make sure each of these pieces complement each other, use the same colors and typefaces, and are otherwise perfectly integrated into your brand. Indeed, such documents are part of your brand! Similarly, train your employees on how to present or "walk through" these items with your clients.

Ensuring that all your marketing collateral AND the ideas presented here all have the same look and "feel" reinforces the safe bridge you are building for your customers. Just as your marketing materials should flow seamlessly to and from each other, so should these other ideas and the processes you design.

INTERNAL BRIDGE SUPPORTS

Design systems, processes, and procedures to prevent misplaced orders and to avoid errors. Just like with the customer-facing supports, build VISUAL elements into each of your internal supports.

HIGHLAND
Ross®
BUSINESS COACHING

PRODUCTION SYSTEM SOFTWARE

Invest in a solid software system.

I am a firm believer in the 80/20 rule. You can most-likely find a reliable software package that does 80% of the things the most-expensive software does, but for 20% of the cost.

Avoid The Bells and Whistles

Integration with your inventory management system or your customer relationship management system is fine, to a point. Be wary of the system that promises too much.

Heed the little voice in your head telling you that you might be purchasing an angry beast to feed constantly.

Look-up Capabilities

Customer-facing employees should be able to use the system with ease to check the status of orders in many ways. My children once had a pediatrician whose receptionists insisted I memorize each child's "file number" so that THEY could find patient records easily. I guess their system couldn't look up a patient by name.
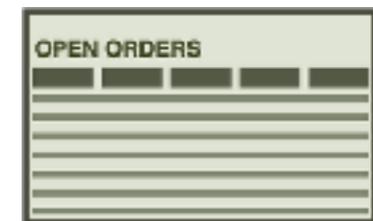
Open-Order Reporting

The software you choose must be able to create an exhaustive list of every live order in the facility. It must also include the various "stations" within your operation.

As an open order moves from one station to the next, be sure to have someone update the production system software. This will make your work-in-process meetings (*discussed later*) much quicker.

ORDER-TAKING PROCESS

Enter orders into "the system" as soon as practicable to avoid delays and lost paperwork.

In some cases, customer-facing employees can enter the order with the customer standing by. Many times, however, your employees may need to enter the order into "the system" a little bit later.

Coach your team on the importance of entering orders in a timely fashion.

If your employees are indeed able to enter the order into "the system" on the fly, fantastic.

If that's not practical, train them to at least capture all the required information on a paper order form. Since this paper can get lost in the shuffle so easily, let me suggest the following:
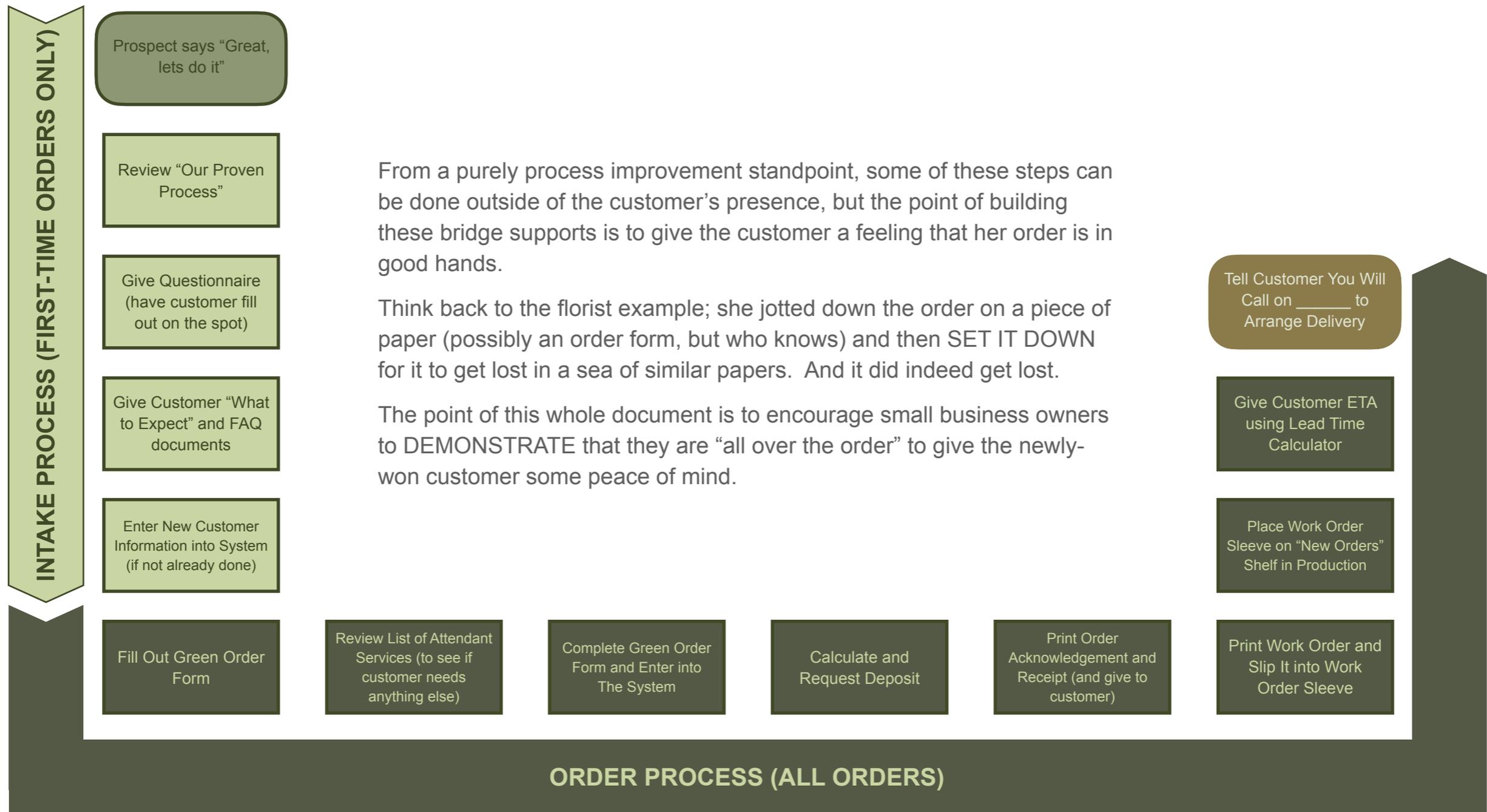
- Have order forms printed on colored paper. The color you choose is up to you, but that color of paper should ONLY be used for order forms. This way, the paper will attract attention visually.

- Place the hard-copy order form immediately in a job ticket box or sleeve (discussed later).

Your team must then enter

EVERY. SINGLE. ORDER.

SAMPLE ORDER-TAKING PROCESS USING SOME OF THESE IDEAS

When designing your order processes, build ways to DEMONSTRATE to your hard-earned customer that their orders are in good hands.

INTAKE PROCESS (FIRST-TIME ORDERS ONLY)

- Prospect says "Great, lets do it"
- Review "Our Proven Process"
- Give Questionnaire (have customer fill out on the spot)
- Give Customer "What to Expect" and FAQ documents
- Enter New Customer Information into System (if not already done)

From a purely process improvement standpoint, some of these steps can be done outside of the customer's presence, but the point of building these bridge supports is to give the customer a feeling that her order is in good hands.

Think back to the florist example; she jotted down the order on a piece of paper (possibly an order form, but who knows) and then SET IT DOWN for it to get lost in a sea of similar papers. And it did indeed get lost.

The point of this whole document is to encourage small business owners to DEMONSTRATE that they are "all over the order" to give the newly-won customer some peace of mind.

- Tell Customer You Will Call on _____ to Arrange Delivery
- Give Customer ETA using Lead Time Calculator
- Place Work Order Sleeve on "New Orders" Shelf in Production

ORDER PROCESS (ALL ORDERS)

- Fill Out Green Order Form
- Review List of Attendant Services (to see if customer needs anything else)
- Complete Green Order Form and Enter into The System
- Calculate and Request Deposit
- Print Order Acknowledgement and Receipt (and give to customer)
- Print Work Order and Slip It into Work Order Sleeve

Highland Ross

26

ERROR-PROOFING DEVICES

Avoid common pitfalls by building simple ideas into your processes to prevent order mistakes.

Process improvement gurus have written on many approaches to prevent errors from happening on a manufacturing shop floor. Most of these ideas involve devices that detect physical abnormalities like the shape or weight of a product; item counts to ensure cartons have the correct quantity; and lasers similar to safety devices on garage door openers. Unfortunately, these physical devices have fewer applications in customer service and office environments. However, there are a few techniques.

Checklists

Checklists, the most common error-proofing tools in service environments, force an employee to complete a form for an order to ensure completeness before the order moves to the next step. These aren't perfect but are certainly a step in the right direction.

Data-Entry Forms

Computer software, specifically your order entry system, employs data entry forms that improve completeness and accuracy.

Paper order forms, discussed previously, also provide ways to ensure completeness of information.

Industry- and Task-Specific Methods

A few other methods for error-proofing in a service environment exist, but they are particular to the industry and application.

Don't let the lack of information on the topic dissuade you from trying new mistake-proofing ideas in your company.

WORK ORDERS, JOB TICKETS, AND JOB TICKET SLEEVES

Combine your systems-based functionality with physical devices to create visibility to each order "in the system", physically, and visually.
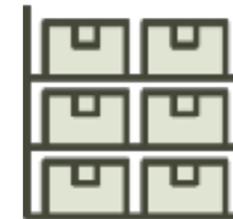
"In The System"

As mentioned in the Production System Software section, create an order for EVERY SINGLE ORDER. Use the software functionality to print a "work order", "job ticket", or whatever your software and your company calls them. They should have a unique identifier, some customer information, and high-level information about the job.

This simple act brings life to every customer order.

Slip the printed job ticket into a job ticket jacket, discussed next.

Physical Devices

These should be next-to-impossible to misplace in your production area. These industrial-strength boxes, sleeves, or jackets contain all the information pertinent to the "life of the order" to help the order fulfillment team in creating the order.

Consider labeling each sleeve with a number, say 1 through 50 (if you never have more than 50 orders going at once). Many software systems allow you to designate the which job ticket sleeve contains the job ticket. This can help you locate a specific order in your facility.

If you install vertical job ticket sleeve holders on the wall, put that job ticket sleeve number in a place that can be seen at a distance when the sleeve is nestled in the rack.

Designated Job Ticket Holders

Post highly visible signage or labeling to designate the physical area for each major process, as well as where job tickets queueing (waiting to be processed) shall be put. Consider installing vertical wall racks for job ticket sleeves at each station, as well.

Have you ever noticed that waiters and waitresses in restaurants have a very specific place where they put customer orders for the cooks? This simple idea ensures that tickets don't "fall through the cracks."

Knowing the few places where job tickets can be also makes it easier to find them in case the customer calls to make a change to the order.

REGULAR WORK-IN-PROCESS MEETINGS

Host regular (daily, every other day, or weekly) meetings with key customer-facing and operations employees to briefly touch on the status of each order.

On Track, and None Through the Cracks

Start each meeting by giving each attendee a list of all the open orders (your production software must be able to generate such a report). Allow me to introduce the concept of **MECE:**

- Each order listed must be *Mutually-Exclusive* of other orders (one order doesn't "overlap" or "spill into" other orders)

- The list of orders must be *Collectively Exhaustive* (every order in the entire universe of open orders is listed)

Briefly touch on the status of each order to ensure each order is on track. Identify and troubleshoot those that need additional attention. Such meetings can prevent a key client's job from falling through the cracks.

Develop (and Enforce) Meeting Ground Rules

Foster a culture of collaboration. As mentioned previously, Six Sigma process improvement gurus offer "attack the problem, not the people."

Don't let your employees throw grenades into each other's canoes. People do not intentionally create errors. Mistakes happen for many reasons, including rushing to meet deadlines, interruptions, which cause loss of concentration, lack of training, and a lack of understanding of how a task affects downstream processes. Encourage employees to identify process and communication breakdowns, and then capitalize on the learnings.

Some ground rules to consider:

- No rank in the room

- No cell phones

- Be present, no side bar conversations
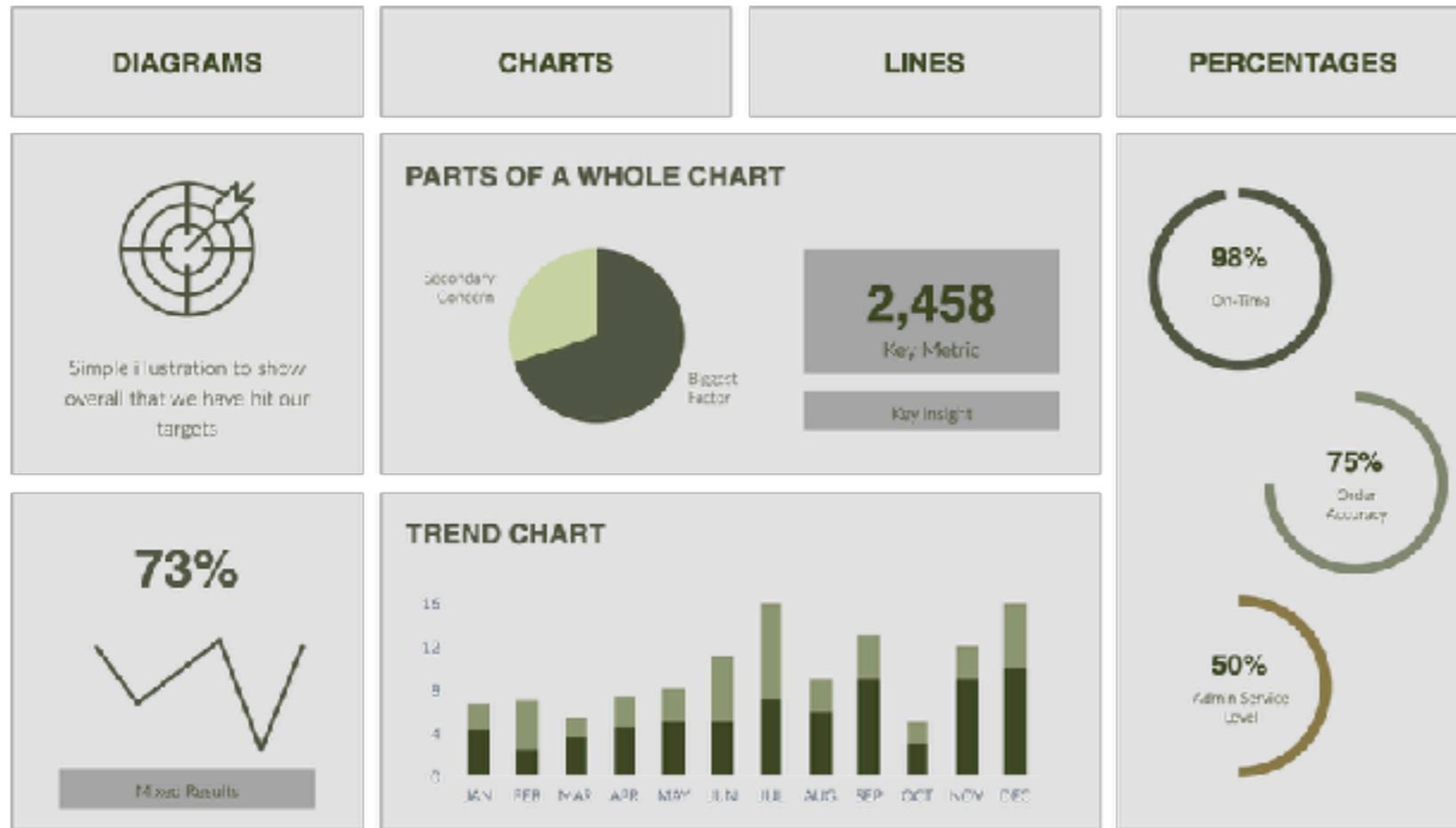
Update the Status of Each Order

The work-in-progress meeting is also an excellent opportunity to update the order status of each order as they move from station to station. Meticulously updating the production system software will make the reports you use for these meetings more accurate (and the meetings themselves much quicker). This, combined with printed job tickets (and slipped in job ticket sleeves), makes it easier to find an order if a customer calls to make a change.

You will be amazed at how a quick little discussion of each order jogs people's memories. *"Oh yeah, I need to order more parts."* Or *"The customer just called yesterday to double the order, I need to update the order."* Even, *"What about such-n-such order? I don't see it on the list."*

METRICS

Measure everything.

DIAGRAMS	CHARTS	LINES	PERCENTAGES

DIAGRAMS

Simple illustration to show overall that we have hit our targets

73%

Mixed Results

PARTS OF A WHOLE CHART

Secondary Concern

Biggest Factor

2,458

Key Metric

Key Insight

TREND CHART

15
12
9
6
3
0

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

98%
On-Time

75%
Order Accuracy

50%
Admin Service Level

Some customer service aspects to consider measuring for your business

- order entry mistakes
- the number of incoming order status calls and emails
- the number of times the production department needs to get clarification on a particular order
- how long an order stays in each department
- the total order fulfillment time of each order
- on-time %.

TRAINING

Train your employees on all of these bridge supports so that the orders themselves seamlessly flow across the bridge, from the sales platform to the order-fulfillment platform.

Give your salespeople the tools and information they need to set expectations with their clients properly. Teach them how to acquire all the required information.

Include the "No-Nos," those learnings of what NOT to do. *"You'll be tempted to do_____, but believe me, don't do it. That has the following downstream repercussions."*

Make each training element VISUAL. Everybody has a preferred way of receiving information to learn. Some people like to read text to learn. Others are more "auditory" - they are able to best process information they hear. Most people, however, are visual learners.

Seek to employ as many sensory tools as practical in your training, but offer a double-dose of visual tools.

Train everyone who enters customer orders on how to perform that task accurately.

Include the "spirit of the rule" so that your team members understand the underlying principle for why you do something a certain way. Then, your team will be able to truly think for themselves *when* they get thrown a curveball.

CONCLUSION

Build a safe bridge for your clients to take them from "yes, I'd like to place an order" to "here's your order, how may we be of further assistance?"

HIGHLAND Ross®

BUSINESS COACHING

CONCLUSION

The small business owner should develop and implement a variety of techniques to give new clients a sense of calm that their orders are in good hands.

Ignore this crucial bridge, and you might leave your hard-won customers staring into a bottomless, gaping pit, wondering what they've just gotten themselves into.

ABOUT BOB

Bob Ross of Highland Ross serves as an executive and business coach, working with business owners and leaders who are stuck in some aspect of their businesses.

Through his professional career in corporate America, small business America, and in the community, Bob has come to believe that our community is stronger when its local businesses are anchored with good leaders. The businesses themselves are stronger. Their employees feel safe and secure in their roles in their companies. Business owners' relationships with their spouses and significant others are stronger when they are good leaders. Their children are stronger and more resilient. All of this positivity sends positive ripples throughout the community in many ways, shapes, and forms.

Highland Ross exists to help, to coach, to enable, to challenge our local business owners to be everything their significant others, their children, their employees, and their community need them to be.

Bob's wife Dixie is Director of Finance and Administration at Wake Forest University. They have three spirited, active kids. Rachel graduated from UNC and has taken a job at Epic Systems, Abby is a senior at ECU, and Ben is a sophomore at Auburn. All have been active in the community, the church, and in sports.

bob@highlandross.com

336-671-7640

www.highlandross.com

linkedin.com/in/bob-ross/

facebook.com/highlandross/