CUSTOMER EXPERIENCE WORKING GROUP

UVAFinance

June 15, 2023

UVA

Who are UVAFinance's customers?

How do you think an improved customer experience might impact your area and UVAFinance overall?

Working Group Members

➢ **Lead - Angela Knobloch,** Senior Director, Change Enablement & Continuous Improvement

➢ **Process Expert – Andrew Sallans**, Director of User Success & Services

➢ **Myron Ballard,** Financial Planning & Analysis

➢ **Teri Bowen,** Treasury

➢ **Danielle Hancock,** Change Enablement & Continuous Improvement

➢ **Susanna Huang,** PSDS Operations

➢ **Kriszti Kiss,** Business Intelligence

➢ **Franky Kong,** PSDS Operations

➢ **Jessica Lenore,** Purchasing
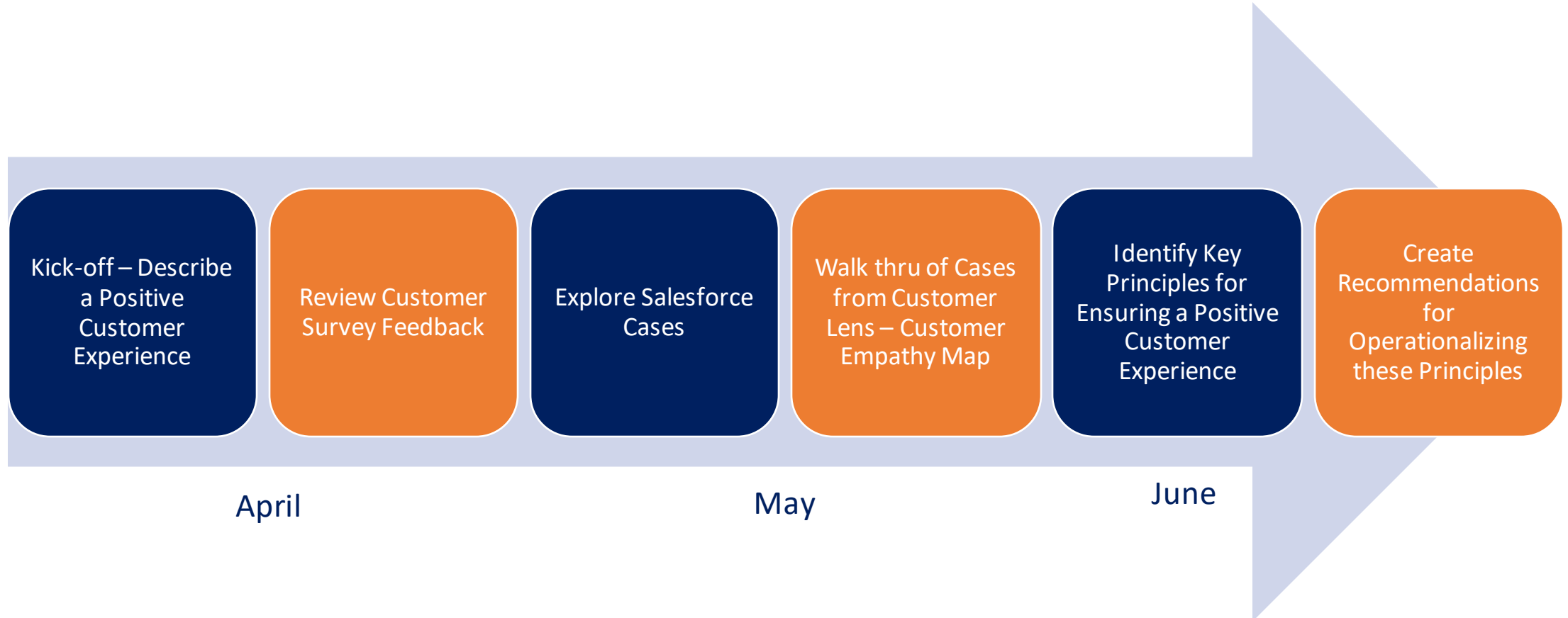
➢ **Brittany Newton,** Business Assets & Cost Recovery

*Sarah Fleming, Mila Savage, Rylee Wiley transitioned to roles outside of UVAFinance

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Purpose & Process

UVA Finance Value: Service Excellence
We believe in the importance of anticipating and understanding the needs of our stakeholders, and in striving to always exceed expectations.

To identify opportunities to enhance the customer experience journey and provide recommendations to create a unified approach across UVA Finance reflecting our value of Service Excellence.

| Kick-off – Describe a Positive Customer Experience | Review Customer Survey Feedback | Explore Salesforce Cases | Walk thru of Cases from Customer Lens – Customer Empathy Map | Identify Key Principles for Ensuring a Positive Customer Experience | Create Recommendations for Operationalizing these Principles |

April

May

June

Principles & Behaviors

> **Essential for Creating a Positive Customer Experience:**
>
> **EMPATHY**
>
> *"The ability to sense other people's emotions, coupled with the ability to imagine what someone else might be thinking or feeling."*

Goal of Providing a Positive Customer Experience

- To meet the customer in the present moment compassionately by identifying the customer's position, situation, and problem with empathy and listening ears.

Behaviors to Support the Goal:

- Ask questions to ensure you know what they actually need

- Ensure the answer to the actual question is provided in a timely manner

- Verify the question has been answered even if you can't answer

- Use the "status' of a case, "my open cases" and "Due Dates" to help you keep track of where a case is in the process

- Reassure customer through connection that you are working on the case (maintain a relationship with the customer)

- Build (or ask to be built) resources, materials and/or knowledge articles when repeat questions are asked

- Practice listening without making assumptions to understand customer's issue

- Minimize passing a case back and forth between multiple functions (understand that customers view Finance as one entity not separate teams)

Recommendations

- **Cross-train**
  - Rotate within UVAFinance.
  - Volunteer within UVAFinance for smaller projects (non-urgent) while utilizing team members within UVA Finance.
  - Designate 1-2 individuals on each team to be cross-trained in other areas of UVAFinance.

- **Team Meeting**
  - Maintain customer Service as a standing agenda item for meetings.
  - Review Salesforce case Surveys/Dashboard data regularly.
  - Review and discuss individual cases/Focus on how cases with good user reviews were handled.
  - Share good customer service shout-outs/callouts – Regularly highlight recent examples of good customer service

- **Supervisor Office Hours**

  - Team members will know when the "door" is open especially in the remote work environment.
- **Communications**
  - Promote customer service achievements in Finance blog shout-outs.
  - Encourage customers to give shout-outs if a Finance employee provided a helpful service.

- **Training**
  - Use LinkedIn Learning videos & Workday Learning
  - Create a UVAFinance training playlist to better cultivate customer service skills

Recommendations

- **Share Best Practices**
    - Use Grammarly/Chat GPT to improve written professional responses to users/customers.

    - Practice Prioritization.
        - Complete easier cases first.
        - Communicate an expectation/timelines to users when handling more complex cases.

    - Cultivate Salesforce Best Practices related to Customer Experience.
        - Discuss how to use Salesforce to improve the customer experience within Salesforce.
        - Analyze salesforce cases/examples and intentionally discuss new ideas on how to use Salesforce for better service.
        - Engage and share customer experience thoughts/ideas during Q&A sessions.

Working Group Takeaways

Discussion & Next Steps

What might you do next to promote and reinforce empathy and enhancing the customer experience?

What barriers do you anticipate for your team in making improvements in customer experience?

What questions/observations/comments do you have regarding the presentation?

APPENDIX

Discussion & Next Steps – Note page

What might you do next to promote and reinforce empathy and enhancing the customer experience?

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Customer Empathy Map