

IMPLEMENTING POSITIVE CHANGE by being CUSTOMER SMART: Immediate and Down the Road

This worksheet is for you to keep.

Begin by PRIORITIZING:

- ✓ *Eliminate any specific items you already have under control (hooray for you!). Mark those boxes "X".*
 - ✓ *Determine your top three IMMEDIATE priorities – action you will take within three months. Mark those boxes 1, 2, or 3.*
 - ✓ *Determine your top three DOWN THE ROAD priorities – action you will take within six months to a year. Mark those boxes 4, 5, or 6.*
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➤ **EVALUATE – know where you are**

- Determine current state of your agency re: “the human element” of being customer smart
 - What are you doing well? Where is there room for improvement?
- Use the “action for change” questions to help determine what steps to take to get started

➤ **SET GOALS**

- How will you measure success for the agency? How will you measure success for each of your people?
- Where do you want to be in six months with this program?
- Where do you want to be in a year?
- How will you communicate status of goals to agency staff?

➤ **BUILD OR REVISE GUIDELINES, PROCEDURES, AND DOCUMENTS**

- Clarify steps for managers to identify, train, and address individual and agency needs and action.
- Determine rewards and reminders.

➤ **PROVIDE PERTINENT INFORMATION AND TRAINING to agency staff**

- Include all employees and volunteers in basic information about the benefits, expectations, and goals of building a customer smart agency.
- Provide initial and ongoing training re: addressing human needs, recognizing and addressing personal filters, and other customer smart tools.
- Walk the walk! Internally and externally.