



DWFS OPPORTUNITY PROCESSING OUTLINE: CELEBRATING CUSTOMER & STAFF SUCCESS

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STEP 1: SARAH'S INTRODUCTION <ul style="list-style-type: none"> • WHO ARE YOU? • WHAT'S YOUR POSITION? • WHAT'S YOUR QUESTION? 	STEP 2: PARTICIPANT FEEDBACK <ul style="list-style-type: none"> • CLARIFYING QUESTIONS • SARAH'S IDEAL OUTCOME* • BARRIERS & CHALLENGES • SOLUTIONS 	STEP 3: BEST-PRACTICE SPEAKER SCOTT AMEY TALKS ABOUT THE BEST-PRACTICES BEHIND CELEBRATING CUSTOMER & STAFF SUCCESS

HOW DO I: (PRESENTED BY SARAH)

- How do I effectively celebrate both customer and staff success?

CLARIFYING QUESTIONS: (ASKED BY PARTICIPANTS)

- What does staff success look like?
- How big is your team? Who do you manage?
- What kind of personalities are you managing? (internal staff)
- How are you celebrating staff success?
- What kind of guidance have you received from your supervisor or PD?
- What does customer success look like?
- What are you currently doing to celebrate customer success?
- How do you like your success celebrated?
- What are you doing to celebrate success in a virtual environment?
- What's the bigger priority? Staff success or customer success?
- Do you have a Dynamic Culture Champion (DCC) at your project?
- Tell me about your limitations when celebrating staff success?
- How do you celebrate staff success in an informal way?
- Have you done personality tests to see how individuals would like to be praised? Conversations with staff about what makes you feel appreciated?
- Do you have a budget for 'celebrations'?
- Do you have a staff newsletter?
- Do you use Paylocity for celebrating success?

MY IDEAL OUTCOME IS: (PRESENTED BY SARAH)

- Have an easy, recognizable way to identify both customer and staff success that supports our company culture.

WHY IS IT SIGNIFICANT TO ANSWER SARAH'S QUESTION?: (ANSWERED BY PARTICIPANTS)

- Builds team morale
- Everyone works harder when they feel appreciate
- It bonds the team and brings people together
- We want people to know that they are valued
- Set standards
- Gives our customers a sense of purpose
- Keeps our customers motivated towards goals
- Lower our turnover rate
- Lead to more customer referrals
- Validates the customers effort
- Changes the atmosphere of the workplace and makes it positive

- **Helps us all feel connected**
- **It creates respect**
- **Gives people a chance to showcase individual achievement**
- **Makes coming to work a positive**
- **Gives us something to strive for**
- **Consistency with our company culture**
- **Improves the trust between leadership and staff; staff and customer**
- **Shows accountability**
- **It shows our customers insight into our positive culture**
- **Celebration of staff in front of customers makes them feel like they are being ‘taken care of’**
- **Shows that we love what we do!**

BARRIERS & CHALLENGES – WHAT ARE SARAH’S BARRIERS & CHALLENGES?

- Lack of budget and funding
- People may be timid
- Board limitations
- Not everyone is comfortable with being ‘celebrated’
- Time management
- Personality conflicts
- Favoritism
- Disengaged employees
- Some people may feel left out
- Easier to focus on the bad than the good
- Lack of communication
- Customers are just here for a degree or certificate and don’t want to be celebrated
- Harder to see success in a virtual world
- Lack of customer engagement
- Childcare issues
- No incentives at the project level; no money
- Wrong information
- Skewed perception of success
- Lack of ‘success’ standards
- Not having clear goals
- Lack of time to attain goals and then recognize success
- Changing or shifting goals
- Self-esteem for customers
- Success is not at ‘one final point’

SOLUTIONS – WHAT ARE SOLUTIONS TO SARAH’S POTENTIAL BARRIERS AND CHALLENGES?

- Success board for customers to share stories
- Newsletters for staff
- Learning how to be a cheerleader- encouraging customers
- BE aware of smaller success in staff and customers
- Microsoft Teams has a ‘praise’ app
- Encourage your DCC to be part of the process
- Using Paylocity community boards
- Collaborate with supervisors and figure our finding for celebration
- ‘Travelling trophy’
- Ask individuals how they want to be celebrated
- Create a celebration committee
- Establish some consistency
- Set aside days and times for encouragement and coaching
- Empowering 101
- Encouragement buckets – valentine’s day cards
- Utilizing a customer survey to see which staff have done great work
- Adopt an attitude of success for yourself. It increases awareness of success around you
- Send congratulations cards to customers who do a great job; thank you cards
- Customer success stories on social media
- Assume customers and staff are acting with good intentions to avoid reacting in a negative way
- Follow-up with customers even after they are employed

BEST PRACTICE SPEAKER: (SCOTT AMEY ANSWER SARAH’S QUESTION)

- #1 – We *must* be in a proactive state of mind to celebrate success
 - Consciously thinking about how we are celebrating
 - Changing our perspective on what success means – this will look different to everyone!
 - “just be better today than you were yesterday” – 1%, 10%, does not matter – as long as we’re making progress, we are being successful
 - If we are stagnant and do not recognize small success, we won’t progress or develop
 - At the end of the day, people want to be VALUED
 - Supervisors: This is an everyday mindset. Look for ways to celebrate success EVERYDAY. If we are too performance based, we have lost the overall purpose
 - Virtually: it might be easier to recognize successes now because we have less barriers.
 - Daily Huddles every day at all projects: This an opportunity to recognize success everyday (customer & staff)
- #2 – Communication
 - If we define success differently, it’s the responsibility of the supervisor and staff during 1-on-1’s to communicate and establish personal celebration preferences
 - What does success look like for you in the next two weeks? Have a conversation!
 - If you establish goals and make progress towards that goal, we are celebrating success (customer & staff)
 - Employee must take ownership and define what success looks like – this can’t be a one-way street
- #3 – Implementing a Customer Success mechanism: ‘Ring the Bell’ & Customer Success Boards
 - Ring the bell – somebody got a job! This is an opportunity to showcase customer success.
 - Customer Success Boards – showcasing success stories in the office
 - Being human-centered*
 - Being proactive
 - Focus on little stuff and performance measures will come
 - People are looking for recognition, not necessarily a \$10 target gift card...
 - Provide coaching

- #4 – Find your opportunities to showcase your skills
 - Join a committee
 - Join a task team that is been identified at your center
 - Peers will begin to recognize your success when you are involved at the project level

- #5 – Give customers the opportunity to showcase their skills
 - Tell your story & talk about your experience
 - Share your success
 - Give customers value by involving them in the process

- #6 – Defining “EFFECTIVELY”
 - What is ‘effective’ is determined by the receiver
 - For celebration to be successful, it needs to be valued and meaningful to the staff/customer

- SCOTT’s RECAP:
 - Being conscious
 - Being proactive
 - People want to have conversations with supervisors/CMs (have an even split)
 - What can I do better? (50%)
 - What am I doing well and where am I growing? (50%)
 - Recognize successful points along the way, don’t just recognize the END point

QUESTIONS:

- How often should we celebrate success? Every day, every week, etc?
 - Something has ‘gone right’ every time we interact with a customer/staff
 - Why shouldn’t we celebrate every time? Build off small things
 - This does not ALWAYS need to be a big event – a simple ‘high-five’

- Should you still celebrate small success within teams when overall performance is below standard?
 - Yes, we can still celebrate success if we can identify bite-sized chunks of what needs to be accomplished
 - Identify what is below standard- what is our plan? How do we identify success along the way? Let’s make it happen!

- Let’s say you have two people on your team who need ‘celebration’ differently. Is that okay?
 - “I treat everybody differently”
 - Everyone has their own personality and has specific needs
 - Find a way to motivate, empower, and embrace the individual who might have different needs

- Aside from customer boards and ‘ring the bell,’ what can we do to acknowledge success?
 - Know the individual and what they want
 - Get creative- bring the family in!
 - If they are WE/WBL/OJT, work with other supervisors to acknowledge in different settings

- With a multi-cultural staff, how important is it to understand various backgrounds and cultures when celebrating success?
 - Build rapport 101
 - What is their personality?
 - What do they like?
 - What is their family like?

- What’s the best recognition you’ve received? What was it like?
 - Private conversation with my boss
 - Simple and direct – “we wouldn’t want to try and do this without you”
 - Resonates with me because they truly value what I bring to the table

- How do you coach your PD's to recognize their staff?
 - Same best practices as above
 - Find ways to communicate and effectively learn about people to coach them
 - "You can't manage from behind the desk"
 - Our job as leaders is to help people along their career pathway and develop skills – only way to do this is to interact with people and have transparent conversations

- How can you shift from celebrating success via performance to celebrating success for QUALITY work?
 - Performance is something to be proud of, but the #s tell us little
 - Case notes tell us a better story
 - The work that you do (90% of the time) will drive performance
 - Worry about doing a quality job first and foremost
 - Be professional and be critical of your work
 - Did we accomplish what we wanted?
 - Did we do this well?
 - What happened with the customer/staff?
 - There's a face and a name behind every number. When you lose sight of that, problems arise