

# Moments of Truth in Volunteer Management:

## USING A QUALITY CUSTOMER SERVICE APPROACH

By Kenneth J. Kovach

This is the decade of an expanded awareness of the many dimensions of quality customer service. It is a time when leaders and managers in the service sector are concerned not only about attracting new customers but also about retaining the ones they have. It sounds somewhat like our work with volunteers: recruiting and retaining on a regular basis. We may not call volunteers our "customers," but perhaps refer to them as "constituents" or "clients" or "consumers." The bottom line, however, is that we try to develop an exchange relationship with them so they will become a part of our organization and stay with us for some significant period of time. The nature of this relationship can be understood today from a *quality customer service* perspective based on a marketing approach to doing business in this new decade.

Almost 60 percent of all the people employed in the United States is part of the service sector. This applies to four broad segments of our economy: (1) transportation, communications and utilities, (2) wholesale and retail trade, (3) finance, insurance and real estate, and (4) services, including accounting, engineering and legal work; housekeeping, barbering and recreational services; and most of the not-for-profit areas of the economy.

We can talk about the dimensions of customer-focused services in the follow-

ing terms: "Help Me"—the classic sense of helping offered by all four of the service sector segments; "Fix It"—the sense that we are a nation of many things that are broken and/or not working for some reason, and whoever made it or served it is responsible, and "Value-Added"—shaping the way we do business to serve the customer in the best possible way.

**There have been significant changes over the past five years in the profiles of people who volunteer. Do we really know our volunteers—our "customers"—today?**

### The Value-Added Dimension

This last dimension—"value-added"—is the most intangible of all and more easily understood by example than by definition. A potential volunteer calls our organization and says, "I would like to volunteer!" We talk with her on the telephone, schedule an appointment to meet face-to-face, and then what happens? The volunteer comes into our organization and begins to develop a relationship with us. We ask a lot of questions but also give a lot of information. We talk about the organization, what role it plays in the community, what kinds of services it provides and to whom,

what specific things volunteers do within the organization, etc. If we have been prepared, we have provided a big-picture orientation to our organization and have added value to the experience of that volunteer. A very popular definition of quality customer service is "to exceed the customer's expectations of service."

### The Service Management Challenge

Several years ago when I began developing training programs in the field of customer service, I renewed most of the best-selling books about the topic and they focused my attention on two key concepts: (1) the Service of Management Challenge and (2) the "Moments of Truth" Cycle of Service. In *Service America! Doing Business in the New Economy*, authors Karl Albrecht and Ron Zemke write: "Service is now the business of business in America. The capacity to serve customers effectively and efficiently is an issue every organization must face." To be a truly customer-centered organization (not product- or turf-centered) requires a shift in management philosophy and practices. "Increasingly," they say, "the marketplace is opting to do business with those who serve and declining involvement with those who merely supply."

We have maintained for decades that as professionals in this not-for-profit sector, we are dedicated to service. Throughout my professional career, however, I have worked with hundreds of organizations that have failed to provide their serv-

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ices from a *customer-service* perspective and, in many cases, have lacked a basic understanding of service management.

We have heard a lot about empowerment these days, in part because of the dependence our services have created for many persons. Therefore, I concur with my colleagues in the service sector that our organizations must develop the following capacities: (1) the ability to think strategically about service and incorporate a strong service orientation into the vision of their strategic future, and (2) the ability to manage the design, development and delivery of service.

As we relate service management to working with volunteers, we should focus our attention on the most recent marketing research available to us—both locally and nationally. There have been significant changes over the past five years in the profiles of people who volunteer. Do we really know our volunteers—our customers—today? Have we incorporated new marketing information about them into our planning processes, into job design, recruitment, interviewing/screening, training and enabling?

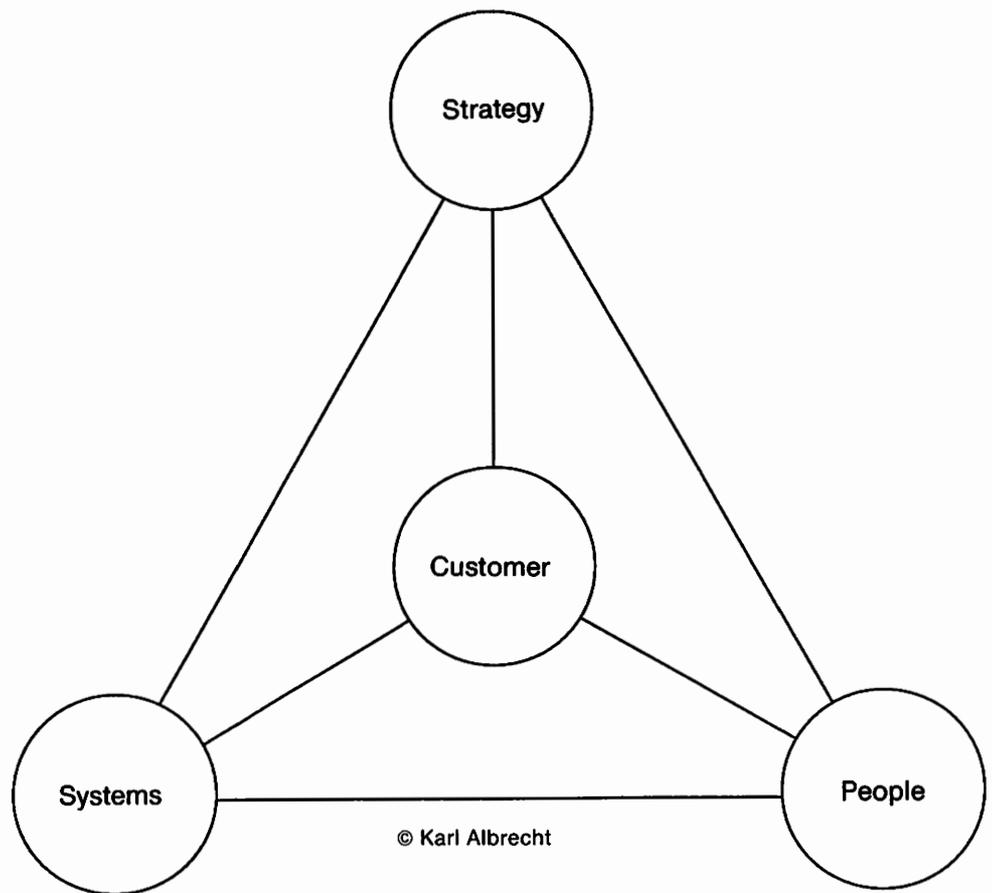
In most cases, our volunteers become part of the delivery of services. What have we done lately to prepare them as service representatives of our organization? We have the dual challenge of seeing volunteers both as the consumers of our services and as service providers. So they must be seen as our partners in effective service management.

### Outstanding Service Characteristics

Albrecht and Zemke identify three features that outstanding service organizations have in common:

1. A well-conceived **strategy** for service, which directs the attention of everyone in the organization toward the real priorities of each customer
2. Customer-oriented frontline **people**, who are tuned into the customer's current situation, frame of mind and need
3. Customer-friendly **systems**, which are designed for the convenience of the customer rather than the convenience of the organization.

The Service Triangle represents the three service elements of strategy, people and systems revolving around the customer in a creative interplay. This model represents a process rather than a structure; it includes the customer in our conception of our business. The organization exists to serve the customer *as well as* the



### THE SERVICE TRIANGLE

needs of the people who are serving the customer.

#### "Moments of Truth"

Jan Carlson, chairman of Scandinavian Airlines System (SAS), wrote about the "moments of truth" he observed in his organization and focused attention on the cycles of service. "We have 50,000 moments of truth out there every day," he says. By Carlson's definition, these are the episodes in which a customer comes into contact with any aspect of the company, however remote, and thereby has the opportunity to form an impression.

As we think about the volunteers in our organization, how many "moments of truth" can you identify? Who is participating in these moments of truth? Are you there every time or is it other paid staff and volunteers?

"Most moments of truth take place far beyond the immediate line of sight of management," say Albrecht and Zemke. "Since managers cannot be there to influence the quality of so many moments of truth, they must learn to manage them indirectly, that is, by creating a customer-oriented organization, a customer-friendly

system as well as a work environment that reinforces the idea of putting the customer first."

For the service provider, the customer's perceptions of quality depend on both the result of service and the service process itself.

We can look at quality service from two perspectives: (1) the procedural side of service, which consists of the established systems and procedures to deliver services and/or products, and (2) the personal side, which shows how service personnel use their attitudes, behaviors and verbal skills in interacting with customers.

By utilizing the Cycle of Service Model, we can develop an in-depth understanding of both perspectives of service delivery within our organization; we can identify each and every "moment of truth." Let's look at one of the various programs and services in which volunteers are involved. Our focus is on the key contact points between staff and potential volunteers; each one is called a "Service Context."

1. The potential volunteer has called for an appointment and the telephone creates the first moment of truth—with whom? Does the person who answers the tele-

# THE MOMENT OF TRUTH MODEL



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phone understand how your organization is customer-oriented? Is she/he prepared to receive as well as give information to facilitate service delivery?

2. Contact is made with your volunteer office, but you, as volunteer administrator, are not there. Another moment of truth has arrived! What's the game plan for when you're out? How many times must a volunteer call back?

3. The volunteer comes in for an interview; she/he is out of breath because of (a) the three-block walk to your office, (b) the lack of guest parking spaces because staff has used them, (c) the receptionist doesn't

really know where your office is located.

4. During the interview, you can't seem to find the volunteer job description (or don't have one for the job). Are you really prepared for this person and can she/he tell you're not really serious about this situation?

5. After the interview, you go to the department that has requested the volunteer assistance and (a) it doesn't have the job available anymore, (b) it doesn't know who you are, (c) it has no one who can talk to you right now—you didn't call ahead to tell them you're coming . . . I think you're beginning to get the picture!

Each one of us has a personal storehouse of memories of moments of truth in our life experiences. We experience the moment of truth as intensely personal. We may even forgive "glitches" in the system of an organization, if there is at least one individual who acknowledges our personal needs and makes an effort to correct the situation. In the world of volunteerism, however, people have more choices than ever before and will not tolerate systems, people and services that are out of touch with the new levels of expectations of quality customer service. ■

### CYCLE OF SERVICE WORKSHEET

For each major component of a program/service in your organization, complete one Cycle of Service Worksheet and specify the following using the Service Triangle as your guide:

**(1)** What is the service (or part of the service) being provided and is there a clear STRATEGY (underlying purpose) for providing that service?

**(2)** What SYSTEM (or part of a system) is operating at this moment to support the delivery of service and it "user friendly"?

**(3)** Who are the PEOPLE involved at this point in regarding your organization's "customers" and this customer's specific needs(s)?

Completed accurately, the Cycle of Service Model will give you management information for supervisory discussions, in-service training, and over-all staff team development. In the most successful service organizations, customer service is everyone's business! The concept of managing the moments of truth is the very essence of service management.

### THE CYCLE OF SERVICE MODEL

A Customer Service Approach:

# IF YOUR VOLUNTEER HAS A PROBLEM . . .

By Steve McCurley

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*The following lists have been adapted from training materials developed by Steve McCurley for improving customer relations. We have substituted the word "volunteer" for "customer" so you can see how a customer orientation can apply to a volunteer department as well.*

## **Keep your cool.**

- If you're right, there's no reason to lose your temper. If you're wrong, you can't afford to lose it.
- Don't argue. Convincing yourself that you are right won't help you recruit or retain a volunteer.
- Be positive in your approach—even if your organization is totally in the wrong. You don't have to be defensive. Be positive about your intention to *correct* the mistake.
- Allow the volunteer to blow off steam, but don't take it personally and try to get him to do it in private. There is no sense in embarrassing you and disturbing other volunteers.
- Never let the volunteer lose face.

## **Listen with empathy and look for the facts.**

- Show that you really care about the volunteer and her problems. A volunteer who sees that you are concerned is more likely to stop complaining and start working toward a solution.
- Listen for areas of agreement and agree with the volunteer whenever you can.
- Nod your head in agreement, paraphrase important points and confirm with the volunteer that you have his side of the facts correctly. Agreeing is not enough; you must *show* that you agree.
- Ask the volunteer what she wants done to solve the problem.
- If the volunteer thinks that you really care about him and his problem, he will begin to look at you as his ally in solving the problem, ignoring the fact that you are an employee of the organization he is complaining about.

## **Take action to solve the volunteer's problem.**

- Do what you can to solve the volunteer problem. If you can't solve the problem yourself, refer her to someone who can and take what steps you can to put her in direct contact with that person.
- If possible, offer the volunteer several options and let him choose which would be most satisfying.
- If you are at fault, apologize.
- When offering solutions, state them in a positive manner: Avoid phrases like "we can't do that today" in favor of "we can meet with your supervisor first thing tomorrow."
- If you can't solve the volunteer's problem, say so directly and politely. Then ask the volunteer what sort of other settlement might satisfy him.
- When citing an organization rule, always explain the justification for the rule.

## **Bring the session to a polite close.**

- After you've done what you can, ask if there is anything else that you can do to help.
- Thank the volunteer for bringing the problem to your attention.
- If possible, make a follow-up call to the volunteer to check on her satisfaction.
- Keep the volunteer informed of progress. Expectation without information will only heighten anger.

A Customer Service Approach:

# WHAT NOT TO SAY TO VOLUNTEERS AND POTENTIAL VOLUNTEERS

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## **“I don’t know.”**

If you don't know, your job is to find out. There is no need to show your ignorance when the volunteer already thinks you should know the answer. Instead, say “I want to make sure I give you the right answer. Let me check and find out.”

## **“We can’t do that.”**

A direct negative from you is guaranteed to produce a directly negative response from the volunteer. Look for an acceptable alternative solution. Say what you *can* do; don't dwell on what you can't do. Say, for example, “What if we were to [solve the problem this way], instead of . . . ?”

## **“You’ll have to . . . ”**

Volunteers who already have to go out of their way to correct a problem do not like to be told that additional effort is required to resolve the situation. Try to soften the requirements by using phrases like “if you could help me by doing this . . . ” or “here’s how we can help with that . . . ” or “if this should happen again, here’s how to get the quickest response . . . .” If you have paperwork that needs to be completed, assist the volunteer in completing it.

## **“Hang on a second . . . ”**

If you have to make potential volunteers wait, ask their permission. Do not just abandon them. After explaining why they must wait, say, “Would you like to hold or would you rather I call you right back?” Most people are willing to hold once they understand why they are being asked to do so. If it is going to take a while, give the volunteer an estimate of how long it will take and get back to them within that time period.

## **“No” at the beginning of a sentence.**

Phrasing sentences this way sounds like a total rejection. If you have to turn down a request, try combining the rejection with a conciliatory offer or sympathy or a question about a satisfactory alternative. Try to inject some positive note into all responses, focusing attention on what you are willing to do for them, not on what you aren't willing to do.

A Customer Service Approach:

# OBTAINING VOLUNTEER FEEDBACK

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- Always talk person-to-person with your volunteers. Spend some time with them. Get to know them and let them know you. Listen to them.
- Organize focus groups. Invite selected volunteers to come in and discuss what they like and dislike in an open forum. Invite both satisfied and dissatisfied volunteers.
- Ask volunteers to respond to a survey, via phone or mail. Provide them with feedback on the results of the survey and what you intend to do because of it.
- Ask volunteers about what problems they are having, what they think should be done about the problems, what they like about your program, and what else they would like to see you do or provide.
- Have suggestion boxes and feedback forms easily available.
- Keep track of problems you are having, why they occur and what you have done about them.
- Thank volunteers who tell you about problems or make suggestions. Give them the credit for helping you make things better.
- Move volunteer communication and problem-solving from a low organizational priority to a high priority.
- Measure employee performance based on volunteer feedback.
- Respond rapidly and openly to all volunteer complaints.
- Encourage employees to tell you about volunteer complaints and suggestions, about what they tried to do to satisfy the volunteer, and about the volunteers' reactions to their attempts.

*"You can observe a lot just by watching."*  
—Yogi Berra