

## Customer Service Action Plan

Listed below are measurement indicators for consumer/customer service that provides an assessment of the level of customer service within the behavioral health organization based on a service focus range of **Client Focus – Consumer Focus – Customer Focus**.

Service Area/Opportunity	Typical Customer Service Concerns	Solution Options
<b>1. Telephone Access:</b>		
• Number of Rings		
• Greeting/Friendliness		
• Time On Hold/Re-Empowerment		
• Background Music/Information		
• Transfer Levels to Staff		
• Protocol for Voice Mail Responsiveness		
<b>2. Physical Facility:</b>		
• Identification Signage		
• Parking Adequate/Clean		
• Landscaping/Flowers/Lawn Maintenance		
• Entrance Clean, Easy to Locate, and ADA Accessible		
• Ease of Opening Door(s)		
• Lobby Area Appearance/Capacity		
• Magazines, Artwork, Furniture & Carpeting		
• Registration/Front Desk Accessibility & Hospitality		
• Restrooms – Availability/Cleanliness		
• Signage – Adequate, Clear & Positive		
• Background Music		

Service Area/Opportunity	Typical Customer Service Concerns	Solution Options
<b>3. Reception/Intake Staff:</b>		
<ul style="list-style-type: none"> <li>Politeness/Attentiveness/Responsiveness</li> </ul>		
<ul style="list-style-type: none"> <li>Professionalism/Boundaries/Language Skills/Communication Skills</li> </ul>		
<ul style="list-style-type: none"> <li>Customer Service Empowerment Level</li> </ul>		
<ul style="list-style-type: none"> <li>Terminology/Acronyms Utilization</li> </ul>		
<ul style="list-style-type: none"> <li>Consumer Recognition Wait Time</li> </ul>		
<ul style="list-style-type: none"> <li>Re-Empowerment Wait Time Protocols</li> </ul>		
<ul style="list-style-type: none"> <li>Knowledge of Services/Staff</li> </ul>		
<ul style="list-style-type: none"> <li>Level of Client Wait Time in Lobby</li> </ul>		
<b>4. Access to Care:</b>		
<ul style="list-style-type: none"> <li>Single Number for Access</li> </ul>		
<ul style="list-style-type: none"> <li>After Hours Clinical Triage Capacity</li> </ul>		
<ul style="list-style-type: none"> <li>Clinical Staff Availability</li> </ul>		
<ul style="list-style-type: none"> <li>Consistency of Screening/Triage</li> </ul>		
<b>5. Intake Process:</b>		
<ul style="list-style-type: none"> <li>Wait Time from call/walk in to Intake</li> </ul>		
<ul style="list-style-type: none"> <li>Efficiency of Financial Intake</li> </ul>		
<ul style="list-style-type: none"> <li>Number of Client Signatures Required</li> </ul>		
<ul style="list-style-type: none"> <li>Number of Forms to be completed by Client</li> </ul>		
<ul style="list-style-type: none"> <li>Number of No Shows</li> </ul>		
<ul style="list-style-type: none"> <li>Satisfaction Surveys for Access/Intake Process for Shows and No Shows</li> </ul>		

Service Area/Opportunity	Typical Customer Service Concerns	Solution Options
<b>5. Intake Process (continued):</b>		
• Access to Clinician		
• Efficiency of Clinical Intake		
• Number of Forms Utilized in Intake		
• Number of Questions Asked of Client		
<b>6. General Customer Service:</b>		
• Efficiency of Scheduling Next Appointment		
• Managing Customer/Consumer Service Complaint Protocols		
• Information on Center-wide Services		
• Confidentiality Concerns		
• Meeting Special ADA, Language, & Cultural Diversity Needs		
• Brochures, Newsletters & Information Bulletin Boards		
• Information/Linkage to Community/Self-Help Supports		
• Ability of Organization to Listen to Consumer/Customer and Change Organizational Behavior		
• Timely and Accurate Client Billings		
• Follow up Visit Customer Satisfaction Phone Calls		
• Mystery Visitor Program Participation		
• Customer Service Focus at All Meetings		