



# PACSTX 2023 Annual Conference:

Family Satisfaction and Customer Service:

Leadership, Values, and Organizational  
Introspection

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## Introduction

**Satisfaction** and **customer service** mean different things to different people. But we can all agree on some basic premises:

- It's an overriding **perception** that an organization cares about what is important to people (clients, family members, and staff).
- It's about feelings.
- It has to be mandated by leadership...it's not always the immediate priority
- It can be challenging; it doesn't come naturally to everyone.
- It involves some extra work...beyond basic requirements.

## Defining the problem

What are the **obstacles**:

- Staffing challenges and turn-over are so pressing that extra efforts to focus on the feelings of others frequently seems less important
- Family members and staff don't understand everything we have to do when we're feeling overwhelmed
- Employees (at all levels) are not properly trained to address concerns
- Communication is challenging in the modern world, coming at us every second in many formats. We can miss important communication
- Organizational mood – Cycle of unhappy people who ignore the feelings of others, which can lead to departures and turnover, which ultimately adds stress to the people who remain.

## More obstacles

- **Limited budgets** as wages rise faster than reimbursement rates:
  - Less funds for “extras,” such as outings, special events, fun stuff
  - Caseloads increase – key players only have time for the “basics” and less time for activities that promote awareness of what others are feeling
  - Our best people are leaving (cycle of new people building new relationships)
- **Constant regulatory changes** take focus away “extra efforts” (those little things we do) because we’re always in a learning mode, or “building block” mode. Harder to focus on fun stuff.
- **Crisis mode** can make us too busy to prioritize complaints...seems less important at the time...blows up later. How are we allocating resources during crises?

## What's at stake when customer service declines

- Family members pull their loved ones, further exacerbating budget squeeze



- Constrained budgets stress the organization, and the people who run it



- Declining reputation adversely affects “word of mouth” referrals



- Harder to attract staff, managers, and clinicians who hear about the stress in an organization

Don't underestimate the importance of satisfaction...a lot of people on the outside know what's going on inside

## Six pillars of quality customer service

- 1. Accountability** Take responsibility for what needs to be fixed, don't blame
- 2. Honesty** 100%, never stretch the truth, correct accidental inaccuracies quickly
- 3. Optimism** Project your belief that solutions are possible
- 4. Empathy** What is the person feeling. Compassion drives customer service.
- 5. Communication** Active listening, check understanding, don't forget ("blow off")
- 6. Relationships** Fostering "friendships," people feel comfortable coming to you

## Who is the customer...?

Anyone who **influences** decisions regarding who we serve!

- Clients we serve now
- Clients we may serve in the future
- Family members (current and future)
- Service coordinators
- Current employees / contractors
- Former employees / former contractors
- Outside day programs
- Neighbors
- Surveyors
- Visitors
- Witnesses (to community outings)

## Some very common concerns

We already know what matters to people; so be **proactive** (systematic):

- The basics – clean house, grooming, hygiene, safety, staff stability
- Staff training and attitude – special needs experts, fun, friendly, interactive, kind, extraverted
- Medical appointments – keeping them, communicating before and after
- Day program – not boring, not just “baby-sitting,” fun, active
- Food (quality) and diet (sticking to it)
- Personal belongings – missing items, misplaced in housemate’s room, ruined
- Communication issues – waiting for a response, finding out about a problem from the DSP, “no one answers the phone,” only calling about problems (never for positive information)



## Customer Service “culture”

Organizations that are good at this do the following:

- Periodic large-scale **assessment** to determine every family member’s feelings about the services, and trends in responses
- Actively **solicit** feedback habitually...don’t wait for complaints
- **Teach** staff at orientation...make it a priority to everyone
- Leaders always **model** the pillars, everyone else will notice
- **Authenticity** Care about all concerns, not just family members’ concerns

## Spotlight on leadership - setting the example

Effective leaders are role models for customer service all the time:

- They **listen** to complaints inside the organization and act
- Preserve **relationships**; don't always be "right," don't argue to defend
- They **share** optimistic thoughts and ideas, a positive attitude at the top
- They **intervene** to personally address a family member's concern
- They **sacrifice** for satisfaction – example: taking a call on a weekend
- They have a sense of **urgency** about a complaint and address it first.

## Spotlight on staff – the “truth-tellers”

Family members believe what staff tell them more than what we tell them

- Staff who feel **valued** and **appreciated** will support our vision and:
  - Present a positive attitude to family members
  - Work harder at the “basics” because they feel pride in their work
  - Refer concerns back to the managers who can more effectively address them
- Staff who don’t feel valued may **undermine**:
  - Speak negatively about company, other staff, managers, other clients
  - Stoke fears, relay events incorrectly, magnify the scope of problems
  - Create a wedge between family members and management
  - Leave and take others with them, other staff and even clients, to prove their worth

## Spotlight on process

### **As soon as a complaint is known (without delay):**

- Investigate with open mind; listen actively, check understanding, allow venting
- Develop and agreeable solution together...that fixes and prevents recurrence
- Implement agreeable plan right away
- Coordinate plan (with team), monitor progress, intervene quickly when needed
- Follow-up with concerned party periodically...check in
- If it works, make it permanent
- Praise others for helping, going above and beyond

## Spotlight on teamwork

**Dissatisfaction may be simmering in largescale, deeply rooted issues, and one person cannot solve alone.**

A few examples:

- Orientation and training may be rushed, or needs a total overhaul
- Too many client vacancies create budget deficit, which minimizes ability to attract employees with competitive wages or salaries
- Post-pandemic malaise – bare minimum, outings no longer a priority
- Leaders/managers/nurses not visiting homes enough, impression they don't care

## Spotlight on teamwork (continued)

Largescale issues causing dissatisfaction require a team approach



A team approach requires team members to be motivated to do extra stuff...



To be motivated, team members must feel:

- Valued and appreciated
- Capable (leaders believe in them)
- Satisfied, themselves!!!

## Closing thoughts

- Family satisfaction is not possible without employee satisfaction.
- Leaders must shape an organizational culture that holds satisfaction and customer service as a core company value and set the example for it every day.
- Satisfaction must be prioritized...social media and bad reviews are not going away.
- In today's world, people's feelings have never been more at the center of most issues
- Organizations that address satisfaction proactive and reactively as a top priority will lead their industries tomorrow.

## Questions

Thank you for participating!!

Please use QR code below to complete your session review on your phone:

**Family Satisfaction and  
Customer Service**

