

Division of Older Worker Programs  
Employment and Training Administration  
United States Department of Labor

---



# Voice of the Customer

## Senior Community Service Employment Program

June 2002  
2nd Printing

Success Stories and Guide for Replication

Sponsored by the Workforce Excellence Network

This publication was prepared by ARBOR Inc. for the U.S. Department of Labor, Employment and Training Administration. The opinions are those of the authors and do not necessarily reflect those of the DOL or its employees.

### **Workforce Excellence Network**

The WORKFORCE EXCELLENCE NETWORK promotes continuous improvement and recognizes excellence throughout the workforce investment system, and is the focus of U.S. Department of Labor-sponsored quality efforts. Its Workforce Excellence Board functions as the governing body of the Network, and uses the Malcolm Baldrige Criteria for Performance Excellence as the framework for its national strategy of continuous improvement efforts.

As organizations make commitments to a continuous improvement “journey” of programs, services, products, and processes, the WORKFORCE EXCELLENCE NETWORK serves as a resource of information, technical assistance, learning opportunities, performance benchmarks, validation of quality results, and recognition of excellence in all segments of the workforce system.

This Case Study is one in a series of products to assist in your organization’s quest for performance excellence. Application of concepts and tools, examples of promising practices and workforce excellence, and specific implementation tools are addressed among the many products available.

More information on the products and services of the WORKFORCE EXCELLENCE NETWORK – as well as links to many other resources – can be found on our Web site at: [www.workforce-excellence.net](http://www.workforce-excellence.net). All products are available for downloading.

We encourage you to share and distribute these products with interested colleague organizations, and are always interested in your feedback, suggestions, and success stories.

**GOOD LUCK ON YOUR QUALITY JOURNEY!**

## Contents

<b><i>Introduction.....</i></b>	<b><i>1</i></b>
---------------------------------	-----------------

### ***Part I. Education***

<b><i>Step 1. Defining Our Customers.....</i></b>	<b><i>6</i></b>
<b><i>Step 2. Hearing the Voice of Our Customers.....</i></b>	<b><i>10</i></b>
<b><i>Step 3. Interpreting the Voice of Our Customers.....</i></b>	<b><i>11</i></b>
<b><i>Step 4. Improving Our Organization.....</i></b>	<b><i>12</i></b>

### ***Part II. Application of Training***

<b><i>Application to Overall Program Management.....</i></b>	<b><i>13</i></b>
<b><i>Application to Local Program Management.....</i></b>	<b><i>15</i></b>

### ***Part III. Appendices***

<b><i>Contents.....</i></b>	<b><i>29</i></b>
-----------------------------	------------------

#### ***A. Program Documentation***

##### ***Survey Designs***

##### ***Turning Data into Action***

##### ***Best Practices***

#### ***B. SCSEP Guide for Measuring and Improving Customer Satisfaction***



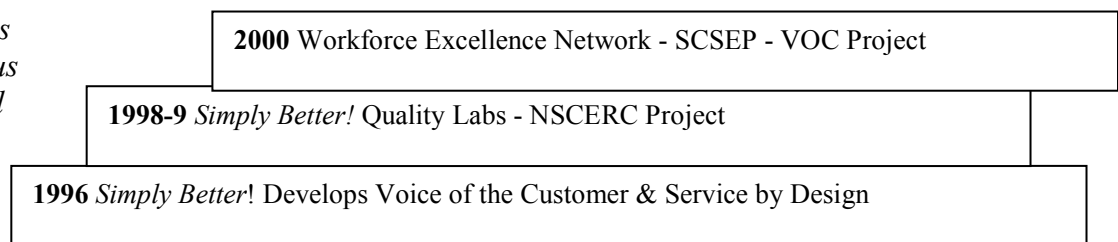
## Introduction

### ***History of the Senior Community Service Employment Program Voice of the Customer (SCSEP-VOC) Project***

The Senior Community Service Employment Program Voice of the Customer (SCSEP-VOC) Project was a stepping-stone in the Department of Labor's Employment and Training Administration's journey to improve quality, productivity, and customer satisfaction. This part of the journey began in 1996, when the *Simply Better!* working committee designed and implemented Voice of the Customer (VOC) and Service by Design (SxD).

Then, in 1998, as part of *Simply Better!* Quality Labs, the National Senior Citizens Education and Research Center (NSCERC) took on the formidable task of conducting a customer study of their sub-grantees. We subsequently expanded the quality effort to include the National Asian Pacific Center on Aging and the National Council on the Aging. In 2000, the SCSEP-VOC Project, funded by the Workforce Excellence Network, took advantage of what we learned in previous projects to take the art and science of large-scale organizational change to a new level.

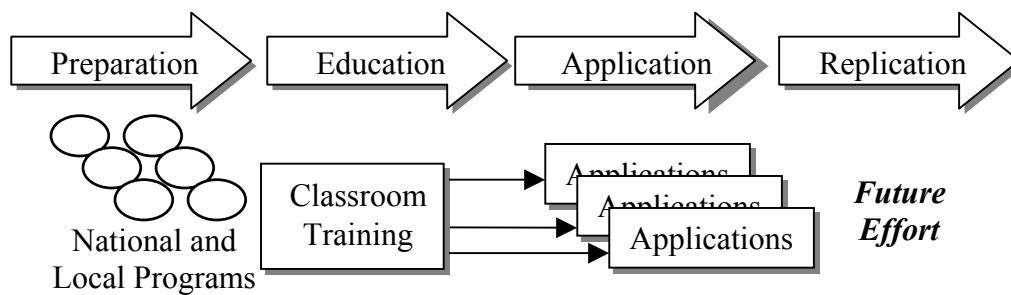
*Each effort was built on previous organizational learning*



### ***Strategy of This Project***

This SCSEP-VOC Project involved a number of interesting characteristics. First, we built it on sound quality improvement technologies; second, we brought together a wide range of national and local agencies; third, we directly combined application with training; and fourth, we created a means for continued and widespread use.

This entire Project followed the steps of preparation, education, application, and replication. First we learned the *Simply Better!* tools; then we applied the tools; next we will replicate the effort on a wide-scale basis.



This publication is organized to mirror these steps. It begins with a description of the preparation and education process that we went through. Next it describes how we applied what we learned in designing and administering our own VOC surveys and interpreting our findings. Appendix A documents the VOC studies undertaken by the agencies participating in this project. Appendix B is a “how-to” guide designed to provide SCSEP projects with the tools they need to undertake their own VOC studies. It provides a road map to use in identifying your customers, measuring the satisfaction of your customers, interpreting your findings, and using these findings to improve your organization. Appendix B is designed so that it can stand alone. You are encouraged to reproduce this Appendix, and share it with your local project operators so that it can be used throughout the SCSEP in measuring customer satisfaction and improving customer service.

## Part I. Education

The purpose of the Project was to train national and local operators under the Older Americans Act, Senior Community Service Employment Program (SCSEP). This program operates under the sponsorship of units of state government and ten national organizations.

### ***Participants***

The following national grantees participated in the Project:

- AARP Foundation
- Green Thumb
- National Asian Pacific Center on Aging (NAPCA)
- National Association for Hispanic Elderly
- National Caucus and Center on Black Aged (NCBA)
- National Council on the Aging (NCOA)
- National Indian Council on Aging (NICOA)
- National Senior Citizens Education & Research Center (NSCERC)
- National Urban League (NUL)
- State of Maryland

Consulting and training provided by ARBOR, Inc., Media, Pennsylvania.

### ***Training Plan***

Training was provided on the Department of Labor's Voice of the Customer (VOC) process.

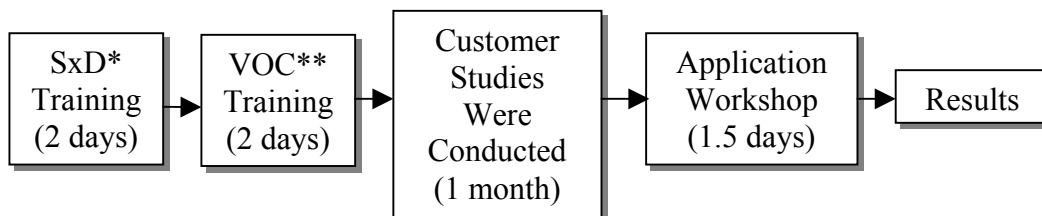
We established three teams, each of which formed up to five additional teams for a total of 15 teams.

All 15 teams conducted a customer research project.

- Los Angeles (LA Team)
- New York (NY Team)
- Washington (DC Team)

Each team included local program operators, national program administrators, and an outside trainer/consultant. Staff from the national grantees facilitated and coached individual work groups.

The training was designed as follows:



\*SxD Service by Design

\*\*VOC Voice of the Customer

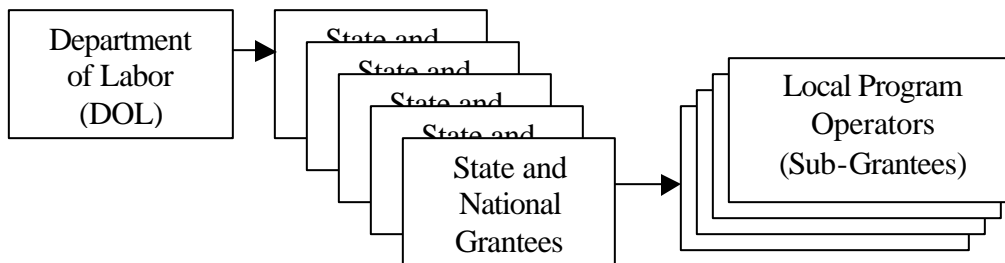
## Project Launch

The remainder of this report focuses on the Voice of the Customer (VOC) training and application. Although we used many Service by Design elements, our main focus was on the VOC tools.

The SCSEP is the subsidized community service employment program designed to serve the needs of a growing population of low-income older Americans through paid community employment, training, and retraining. The dual purposes of SCSEP are:

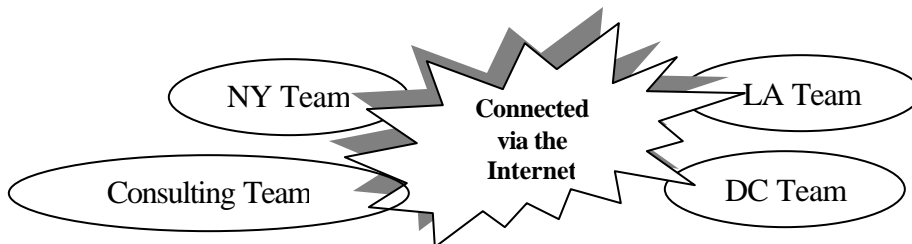
- to provide useful part-time community service assignments and
- to promote transition to unsubsidized employment.

Today, more than 100,000 people participate, and more than 30% of participants nationwide find unsubsidized jobs. SCSEP began more than 30 years ago. Initially the program was run by a small group of national grantees. In 1977, the SCSEP was expanded to include units of state government. Some SCSEP grantees directly administer programs while others work through local sub-grantees.



**Preparation for this Project began with a series of meetings and conference calls to find the best approach. The first team meeting was held in Los Angeles, with members coming from the entire West Coast. Some were from NCOA, others from NSCERC and still others from NAPCA. However we all had something in common: We all were running Title V Older Workers SCSEP programs.**

The New York City and Washington teams had a combination of national and local program operators, except for Washington, which had more national grantees and a state grantee. Also, a consulting team was formed made up of the outside consultant/trainer and facilitators from national grantees.



The teams met independently and exchanged information over the Internet.



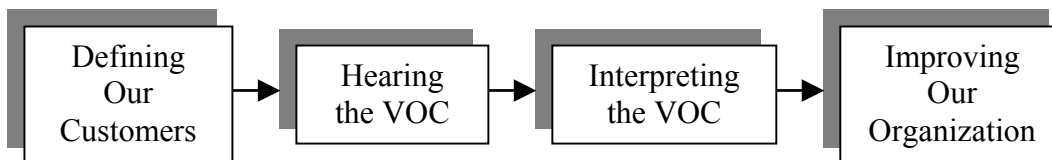
## ***The Training***

Since the training was geared to application, one of the first series of exercises involved each team defining its customer base and developing an improvement objective.

The training was divided into four process steps:

- Step 1. Defining our customers
- Step 2. Hearing the voice of our customers
- Step 3. Interpreting the voice of our customers
- Step 4. Improving our organizations

Training materials and worksheets on this process are available in the Voice of the Customer Workbook.



The four phases of training shown as an improvement process.

## ***Small-Group Projects***

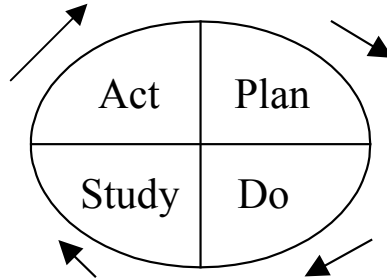


Training sessions were devoted mostly to small group-project work.

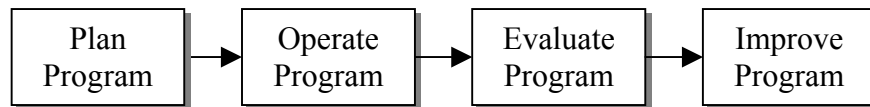
## Step 1. Defining Our Customers

### Process Management

We began with the basic quality improvement cycle developed by Dr. W. Edwards Deming showing how we plan our work, do the work, study the results, and then act for improvement.<sup>1</sup>

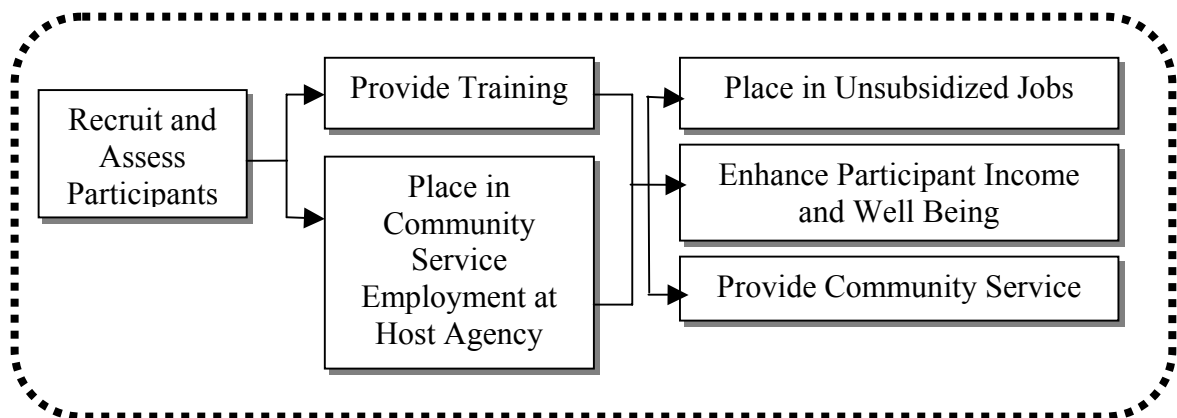


Next, we learned about how to think of our job-training programs as a process, with an input, several process steps and an output. Our process model at the global level looked like this:



This model applies to practically any DOL-funded activity. The planning stage can include all funding issues, such as needs identification, program design and grant application. The operational stage includes running the program. Then comes program evaluation. Finally, based upon the evaluation comes improvement -- how to make the program more effective and more efficient.

In the SCSEP-VOC Project we focused on the program-operation phase and developed a process-management flow-chart.



<sup>1</sup> William J. Latzko and David M. Saunders, *Four Days with Dr. Deming*, Addison Wesley, Reading, MA, 1995, p. 5.

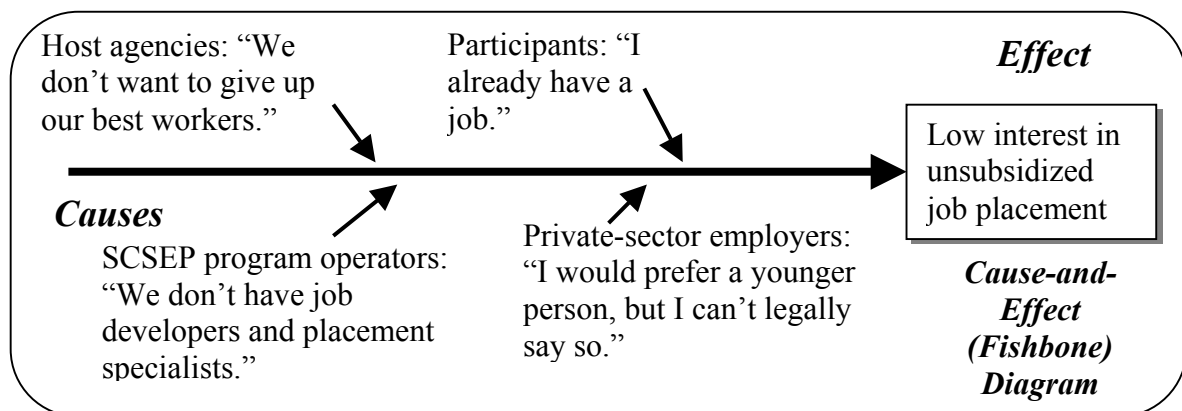
It is simple, some may call it obvious. But such a model can be of help in using the science and art of process management to understand and improve virtually any program.

All activities of the Senior Community Service Employment Program fall under one of the above process steps. SCSEP begins with finding potential participants, conducting eligibility determination and developing an Individual Development Plan (IDP), and then referring participants to training and/or a host agency for community-service employment. Finally, the participants leave the comfort of the host agency environment and “seek their way in the harsh real working world.”

It soon became apparent that not all the process steps are equal. For the most part, SCSEP agencies are good at performing steps one, two and three. We have many sources of referrals, good counseling and coaching skills and the ability to identify and manage numerous host agencies. However, we decided to use the VOC tool for improving unsubsidized job placement..

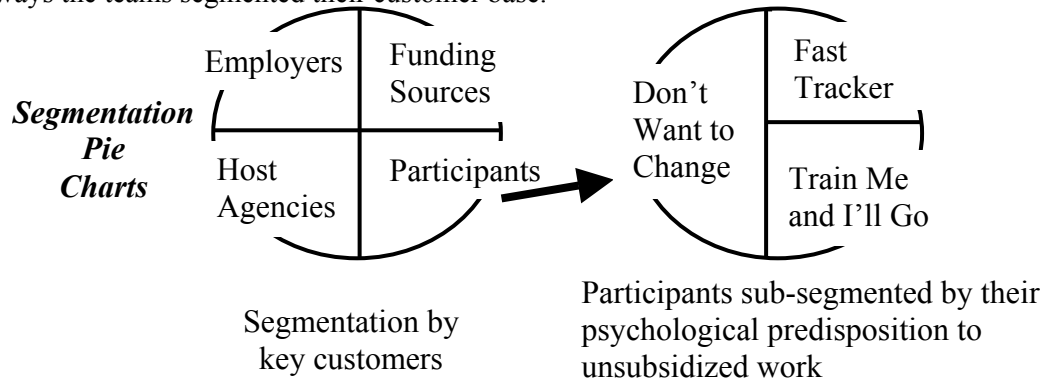
### Root-Cause Analysis

For many years the main focus of SCSEP was on community-service employment. Host agencies were either government agencies or non-profit agencies. Seniors who were placed in these agencies were performing important jobs, and there was great pressure to keep them at the host agency. The cause-and-effect diagram (below) shows that “low interest in unsubsidized job placement” (the effect) had numerous root causes. (This type of diagram is commonly used in quality improvement.)



## Customer Segmentation

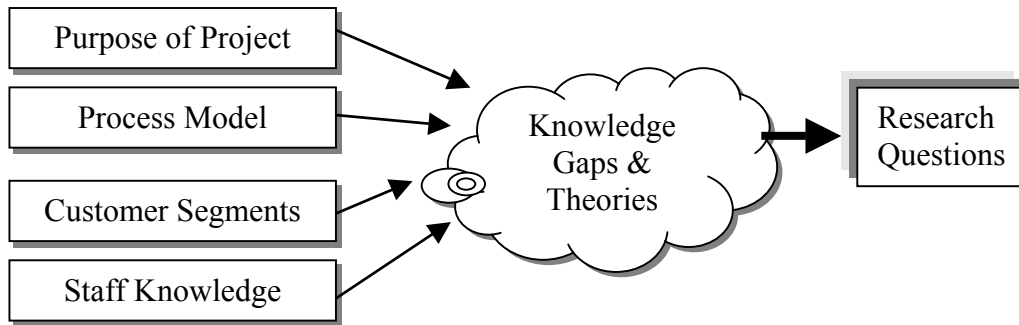
Next we examined the customer groups that make up the customer base. A tool presented in the Voice of the Customer training is the segmentation pie chart and the segmentation tree diagram. Here are some ways the teams segmented their customer base.



Next each team developed a customer segmentation pie chart appropriate for their project. Once we identified segments, we documented our knowledge of them on a customer segmentation profile matrix. This tool provided a simple way to commit to paper the staff opinions, ideas, and beliefs, before actually conducting customer research. The segmentation profile matrix prepared by a NSCERC team is shown below:

<b>Example: Customer Segmentation Profile Matrix (NSCERC)</b>			
	<b>Segment # 1</b>	<b>Segment # 2</b>	<b>Segment # 3</b>
	<b>Project Field Staff</b>	<b>Participants</b>	<b>Host Agencies</b>
Segment Size	145 Projects 27 States	15,600	10,000
What they want?	<input type="checkbox"/> Want host agency orientation <input type="checkbox"/> Want better interviewing skills <input type="checkbox"/> Want IDP tools/guides	<input type="checkbox"/> Want empathy <input type="checkbox"/> Want to be heard <input type="checkbox"/> Want relevant assistance, direction, and options	<input type="checkbox"/> Want to understand Program expectations <input type="checkbox"/> Want Program staff to understand host agency needs and goals
What they get	<input type="checkbox"/> Training in polices and procedures <input type="checkbox"/> Conferences and workshops <input type="checkbox"/> Checklists, but no "How To(s)"	<input type="checkbox"/> Payment <input type="checkbox"/> Personnel policy manual <input type="checkbox"/> Some training <input type="checkbox"/> Video orientation	<input type="checkbox"/> Some get written guides <input type="checkbox"/> Site monitoring

Discussion of the purpose, segments and profile led to development of a series of theories and knowledge gaps. Based on the theories and knowledge gaps, research questions were prepared.



The idea was to think about our customers' world before jumping into research. What do we really want to know and what might we do about it? The teams reported this level of planning was valuable yet was often overlooked in previous customer research. Teams lamented that in previous efforts they began by writing a questionnaire, without thinking through their purpose, segments, theories, etc. Generally, the team members believed that this more rigorous and systematic process led to better results.

## Step 2. Hearing the Voice of Our Customers

Armed with research questions, our teams sought answers in the real world. We thought through our sampling plan, discussed the best data collection method, developed survey instruments and interview guides and then, over the next month, collected real data.

Some workgroups sampled from a single customer segment and conducted face-to-face, in-depth interviews. Other workgroups conducted phone interviews, others used a paper-and-pencil-fill-in-the-blanks questionnaire and still others studied secondary sources of customer data. (For an in-depth discussion of how to design customer studies using these various methods, see the "SCSEP Guide for Measuring and Improving Customer Satisfaction" at the end of this report.)

The most common approach was to conduct about 20 interviews with a single segment, asking questions in a systematic fashion. The question sequence involved:

- **Introduction** (This explains the purpose of the research and may contain a screening question to assure we are talking to the correct customer segment.)
- **A General Question** (This is aimed at eliciting a “top-of-mind” response.)
- **Like Questions** (Here we find what customers want in a product or service.)
- **Dislike Questions** (Here we learn what customers don’t want.)
- **Specific Questions** (Here we ask exactly what we want to learn.)
- **Sensitive Questions** (We save these until the end, when we have built up some rapport with the customer.)
- **Anything-Else Questions** (A final question, “Is there anything else you want to tell me about the Older Worker Program?” This question is a catch-all for items that do not fall elsewhere.)

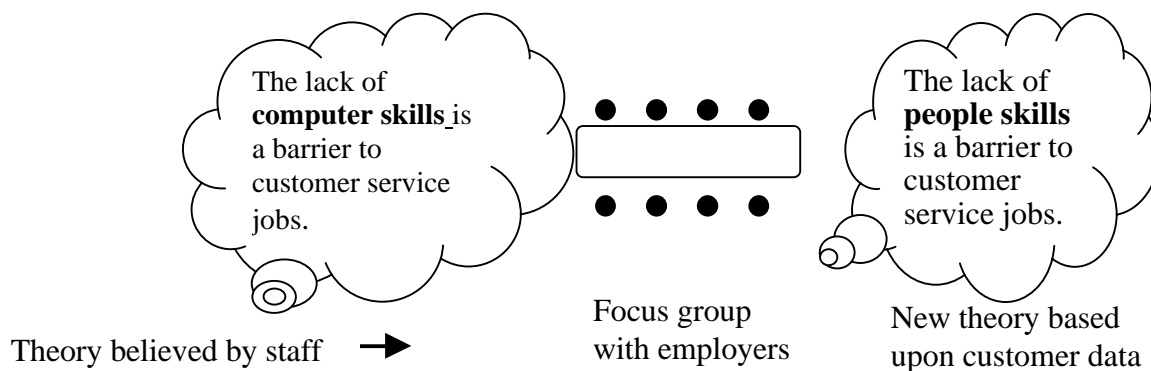
Following the above guide, teams developed numerous survey instruments. Another key part of the learning was the practice of “probing for deeper meaning.” We learned how to ask follow-up questions and follow-ups to our follow-up questions. In this way we can dig to find what is truly motivating our customers.

See Appendix for Examples	
Page	Description
Appendix A-1	Customer Segmentation Profile Matrix
Appendix A-2	Interview guide to study satisfaction on the part of local program directors with services and technical support from National sponsor
Appendix A-4	Survey to determine what tools and skills are needed by staff to be better at job placement.
Appendix A-5	Survey of participants regarding employability workshops

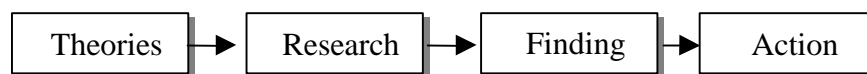
### Step 3. Interpreting the Voice of Our Customers

The interpretation of customer data starts with a theory; that is, what we believe the customers will say. Then we gather data to confirm or change our theory. Theory supported by data becomes knowledge. As knowledge builds, we may someday obtain “profound knowledge.” With “profound knowledge,” we can design and operate truly great, world-class programs.<sup>2</sup>

The NCOA New York City team did a focus group with employers who hire customer-service representatives. (In focus groups, customers sit around a table and answer questions.) Before the focus group, the staff believed that the “lack of computer skills was a barrier to employment.” However, in the focus group, employers said the “more critical barrier was a lack of people skills.” For more information on conducting focus groups see the “Customer in Focus” guidebook available through the Workforce Excellence Network.



In class, we brought our theories out on the table, wrote them on a flip chart and discussed them. We found this to be helpful so that competing theories could be fully understood before people “dug in” and formed unchangeable beliefs. This helped us be more open to the customer data as it was gathered.

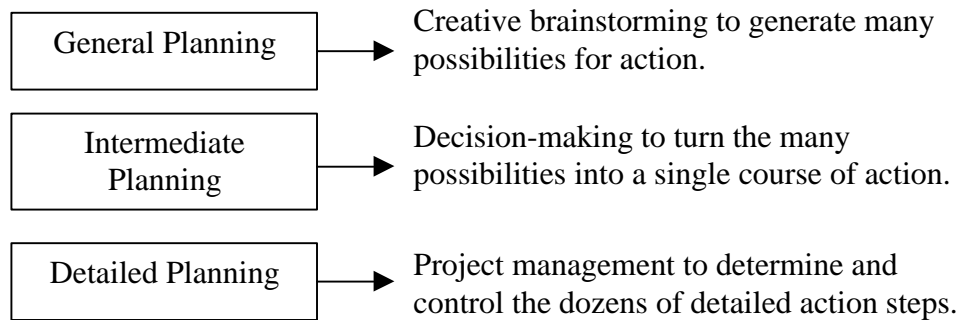


See Appendix for Examples	
Page	Description
Appendix A-6	This table shows the entire process from staff opinions (theories), the customer research, and finally action items.

<sup>2</sup> William J. Latzko and David M. Saunders, *Four Days with Dr. Deming*, Addison Wesley, Reading, MA, 1995, p. 33 – 44.

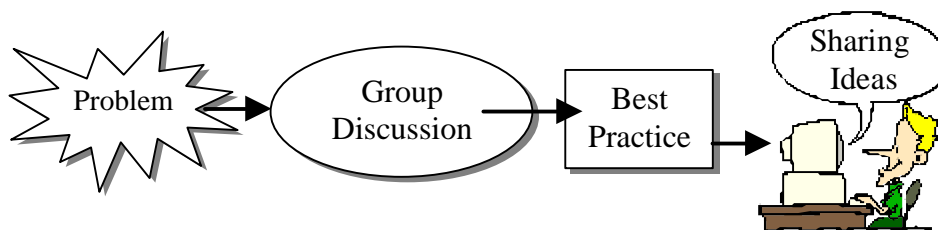
### Step 4. Improving Our Organization

The final step involved turning findings into action. We planned our actions using three levels of planning. The first level was general planning, in which we used creative brainstorming to identify many possible courses of action. The second level was intermediate planning, in which we used decision making to select a specific action. The third level was detailed planning, in which we used project management tools to carry out the action.



Many fine tools for improvement exist in the Service by Design Guidebook, which is available from the Workforce Excellence Network.

An additional benefit of the SCSEP-VOC Project was that our discussion of issues often led to the discovery of “best practices.” These were basically good ideas from one program that could be used by program operators nationwide.



We took common problems, discovered best practices and communicated them over the Internet.

See Appendix for Examples	
Page	Description
Appendix A-7	Host Agency Individual Development Plan (IDP)
Appendix A-8	Paperwork Checklist
Appendix A-9	Best Practices in Job Placement

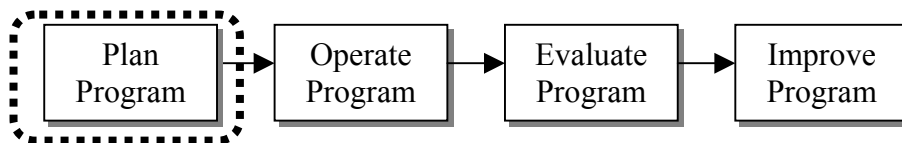


## Part II. Application of Training

During the SCSEP-VOC Project, we formed many teams to apply what we learned. In some cases people from various agencies linked together; in other cases, individual agencies focused on specific projects. This section shows how the Voice of the Customer tools were applied to actual projects.

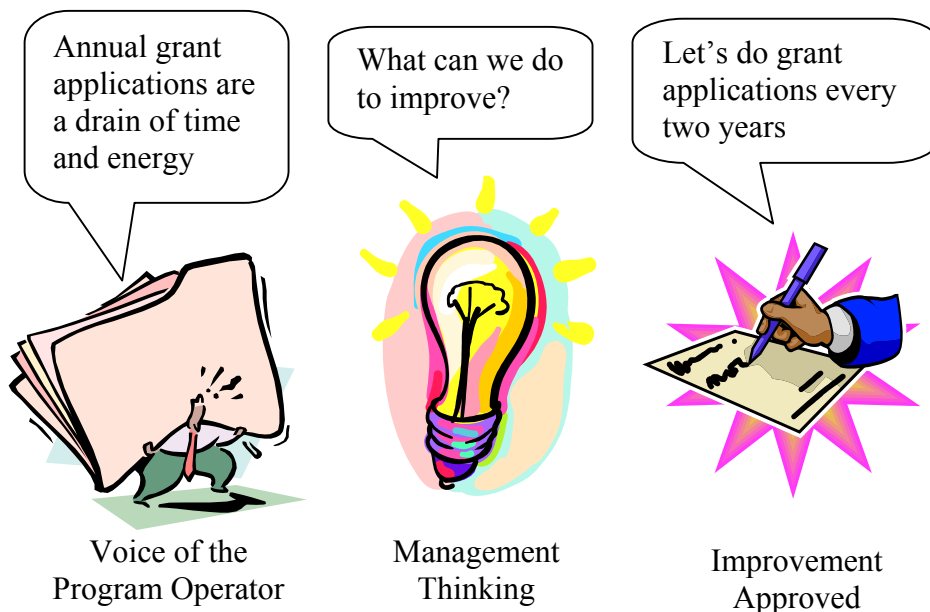
### ***Application to Overall Program Management***

Using the process model, we examined Title V SCSEP as a system. We then showed how particular customer studies focused on particular process steps.



Some of the studies focused on the relationship between the national sponsor and the subgrantees. NSCERC completed a study of this type as part of the Quality Labs process. This study led to a number of important improvements, some sounding simple yet having a huge impact.

For example, while conducting interviews with program operators, the national office heard that annual grant applications were very time-consuming, causing a tangible drain on program operators' time and energy. NCSERC managers, who conducted these interviews, recorded comments on 3x5 cards, sorted the cards into meaningful categories for analysis and then developed improvement projects.



NCOA also conducted a customer-satisfaction survey of local program directors. They looked at “ways to assess customer satisfaction with the level of program management and support provided by headquarters...” A team of managers conducted telephone interviews with randomly selected local program directors. Random selection was an important part of the VOC sampling process. It assured that each office in the population had an equal chance of being selected.

After the random selection of target projects, in-depth telephone interviews were conducted with local program directors. These interviews followed a structured interview guide. (See pages Appendix A-2 and Appendix A-3 for the NCOA Guide to Interviewing Program Operators.)



Random selection of project staff to be interviewed.



Telephone interviews using a structured interview guide.



Worksession to understand and act upon the findings.

One of the findings from the telephone interviews involved the level and style of program monitoring. Some program directors found the monitoring to be more a “faultfinding process” and less a “coaching and technical assistance process.” NCOA is working on ways to standardize its monitoring process.



Program directors reported that monitors had become “faultfinders.”

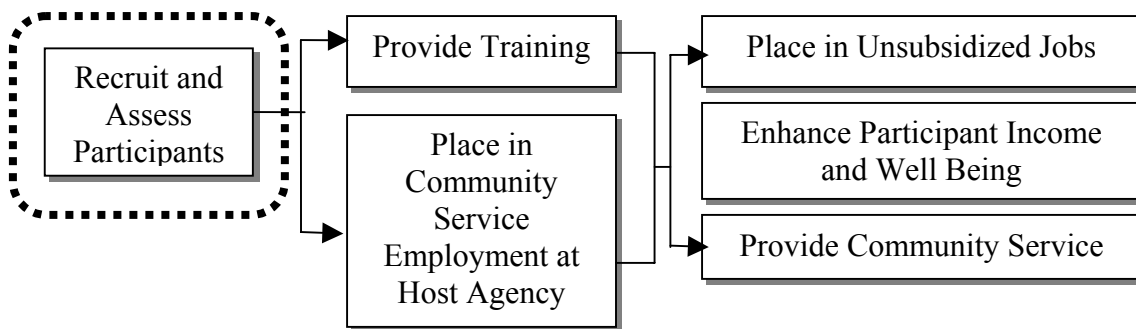


So management worked at standardizing more of a coaching and technical-assistance process.

### ***Application to Local Program Management***

Using our process-management approach, we were able to focus attention on specific areas for improvement. Although most of the activity was aimed at the back-end of the process (unsubsidized placement), insights and improvements were realized from some of the “upstream” processes.

### **Applications at Intake**



The NCOA program in Hempstead, NY, did a customer segmentation analysis that showed:

Segment	Estimated Size
A. Employables	35%
B. Lifers (do not want to leave program)	25%
C. Not ready for employment	30%
D. New enrollees	10%
Total	100%

In thinking about their segments, the program staff also examined their Individual Development Plan (IDP) process. They realized that, although they collect much relevant information, they do not collect some potentially important job-related information, such as personal problems, knowledge of the labor market, financial requirements and attitude toward work. For the purpose of this Project, staff developed an interview guide to explore these issues and then interviewed participants believed to be in Segment A: The Employables.

Program staff learned that, although participant needs and expectations were generally well met, there were gaps. In particular, participants said they were not satisfied with the SCSEP wage level, so staff realized they had not adequately explained that this was only a temporary position, and if participants wanted a higher wage, they must leave the program and obtain higher-paying, unsubsidized jobs.



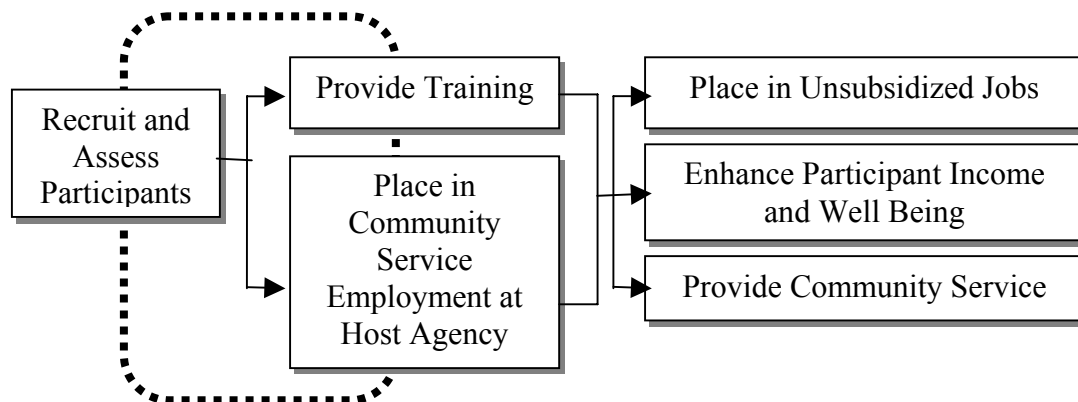
Some participants said they didn't like the "tight money." They want more than minimum wage.



This is now viewed as an opportunity to explain how to obtain a higher-paying unsubsidized job.

Futhermore, staff asked, "Have you had a job interview in the past year?" Thirteen (62%) of 21 answered "no." So clearly they were not making much placement progress – not even with the segment considered employable. Based on these and other findings, program managers decided on a two-prong improvement project. First, they will set up a job-finding orientation for each participant, followed by a personalized job-search strategy. Second, an employer job-development process will be designed to make use of the local employer community, including direct employer contact, as well as use of the local One Stop.

### Applications after Intake that Encourage Unsubsidized Placement



After segmenting their customer base, the NSCERC program in North Babylon, N.Y., developed the following:

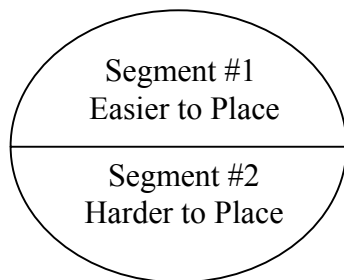
- Theory #1: Seniors with recent work history have a higher placement rate than those who have a long gap in their employment history.
- Theory #2: Seniors with no or low income are motivated (by money) and therefore have a higher placement rate.
- Theory #3: Seniors who desire socialization (they like to be around people) have a higher placement rate than people who do not.

The team developed these theories because they were examining “what we can do after intake to secure a successful, unsubsidized placement.” Before jumping into an action plan, they desired to gather data to see if their theories, which seemed valid, would be backed up with facts. So they designed a simple survey that involved interviewing 20 of their most recent successful placements. (Some social scientists might argue that they should have collected a larger sample size, but for the practical application of customer research, most programs barely had the resources to conduct 20 interviews.)

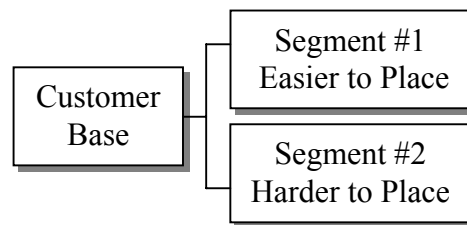
The 20 interviews followed a structured process. The findings were as follows:

- Theory #1: “Work history leads to successful placement” was supported by 50% of the respondents.
- Theory #2: “Having little income is a motivator” was supported by 100% of respondents.
- Theory #3: “The desire to socialize leads to unsubsidized placement” was supported by 100% of respondents.

An action plan was developed to identify the “easier to place” right after intake, not at the end of two-years of community service employment.



Two segments shown in pie chart



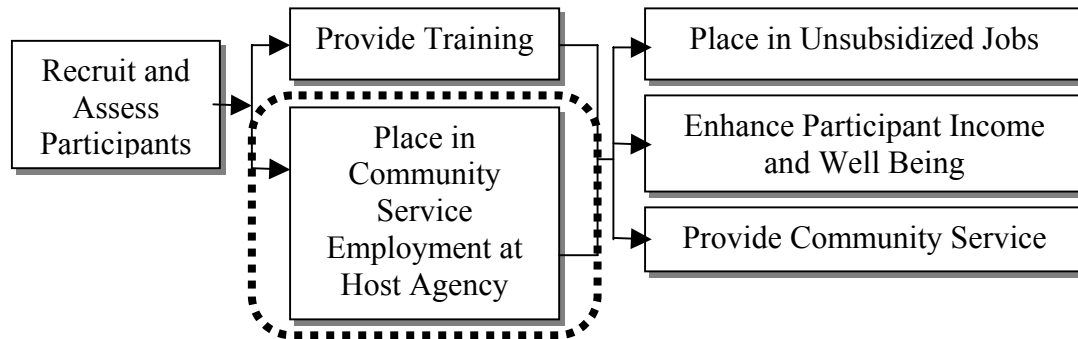
Two segments shown in tree diagram

Segmentation Profile Matrix		
	Segment #1	Segment #2
Segment Name	Easier to Place	Harder to Place
Characteristics	<ul style="list-style-type: none"> <li>•Worked in last three years</li> <li>•Need more than minimum wage</li> <li>•Strong desire to be around people</li> </ul>	<ul style="list-style-type: none"> <li>•Unemployed for three years</li> <li>•Satisfied with minimum wage</li> <li>•Show little interest in socializing</li> </ul>

With these segments in mind, program managers instituted the following procedural improvements:

- ❑ Immediately after intake, prepare a resume.
- ❑ Immediately after intake, start job placement activities.
- ❑ Immediately after intake, identify additional training needs.

### Applications Related to Host Agencies



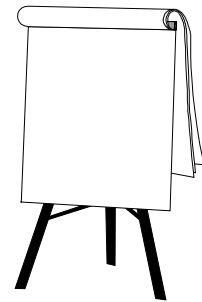
The Los Angeles NAPCA chose to examine its relationship with host agencies. Because they supply the locations for the community-service employment, host agencies are a critical part of the SCSEP process. Across the nation, the DOL is funding thousands of Title V participants in thousands of host agencies, all of which are government or non-profit organizations.



Staff documented their theories using a Segmentation Profile Matrix



Conducted interviews with 12 Host Agencies

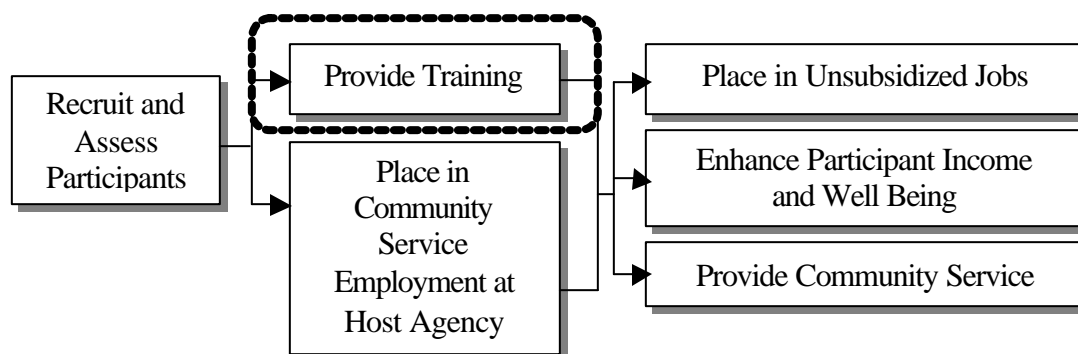


Developed Host Agency IDP to guide placement effort

The team did a segmentation analysis of host agencies. Using the Segmentation Profile Matrix, they documented their own theories about host agencies and then interviewed 12 host agencies to confirm or reject those theories. Based upon what they learned and their previous knowledge, they developed a tool called the Host Agency Individual Development Plan. This tool, developed in Los Angeles, was of such interest in New York and Washington, DC, that it was immediately e-mailed nationwide to all those who participated in the Project.

The team also examined the possibility of assisting host agencies with fund raising. Interviews were conducted with development coordinators at five agencies, and various strategies were examined. This effort will be part of a future SCSEP improvement project.

### Applications Aimed at Job Training



The New York City Department of Aging, working with other NCOA programs in Rockland County and the North Ward Center, used the VOC process to examine “How we can better serve the business community by providing customer-service representatives.” The VOC method encourages staff to articulate and document their beliefs and opinions. We call these “theories” and use them to develop research questions.

Theories about Customer Service Representatives (CSRs)	Research Questions
1. CSRs require high-level computer skills	1. Do employers require computer skills? If so, at what level?
2. CSR jobs do not offer comparable salaries or incentives.	2. What is the pay scale for CSRs? What are the incentives?
3. Seniors are unwilling to work nights, weekends, or holidays.	3. What shifts are required? Are they flexible?
4. All CSR jobs require high visibility.	4. Does the position require direct public contact?
5. Employers require a particular image to fit into their work environment.	5. What special characteristics do you look for in CSRs?

Based upon these research questions, we prepared a research design:

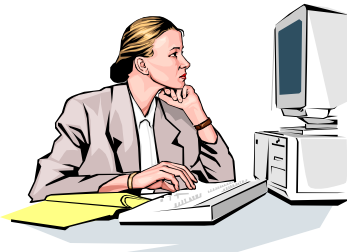
Research Design		
<b>Data Collection</b>		
Survey 25 employers by phone or face-to-face.		
Conduct employer focus group.		
Prepare an interview guide.		
Examine information about labor-market information.		
<b>Industries Sampled</b>		
Retailers	Hospitals	Communications
Day-care centers	Transportation	Banks
Law firms/insurance	Utility	Food service

Using this sampling plan, the following employers participated in the survey:

<b>Employers Surveyed</b>		
<b>New York City</b>	<b>Rockland County</b>	<b>Newark, New Jersey</b>
Old Navy Clothing	JC Penney	Kiddie Korner Day Care
Chase Bank	Disney Store	The Learning Tree
Aetna U.S. Healthcare	CVS	Sherman Community Center
Cooper Hewitt National Design Museum	Store Of Knowledge	
Time Warner, Inc.	Yankee Candle	<b>Focus Group (NYC)</b>
Old Towne Personnel Agency	Helen Hayes Hospital	Gap, Inc.
Emmes Real Estate	ARC (Association Of Retarded Citizens)	Telecharge Systems, The Shubert Organization
Wilke, Farr & Gallage	O & R (Orange & Rockland Utilities)	Food Emporium Supermarkets
Martinson & Martinson	University Hospital	The Riese Organization
Aramark	Home Depot	Greyhound
Symphony Printing		Belkin, Burden & Wenig
Tuttle Employment Agency		St. Barnabas Hospital

Here are some findings based on the survey, interviews, focus groups, and examination of labor market data:

### Finding #1



Computer skills are nice to have but are not a priority for customer-service positions.



More important are interpersonal skills such as being pleasant, reliable, articulate, warm, polite, patient and cheery.



**Finding #2**



Staff thought that customer service jobs wouldn't pay much.



Research showed that part-time was \$6 to \$11 per hour.

**Finding #3**



Employers who have hired mature workers have reported many positive attributes: willingness to work hard, punctuality, reliability, stability, and clarity in expectations. It is also easier to retain mature workers.



Less than 10% reported the following less favorable attributes: absenteeism due to family obligations, inability to stand for long hours, or transportation issues.

**Finding #4**

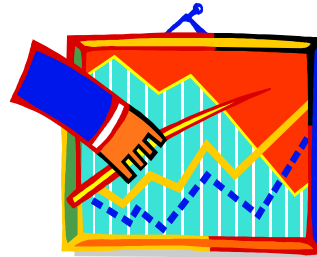
Most customer-service representative jobs require high visibility. Jobs include: sales, bank teller, cashier, insurance representative and receptionist.

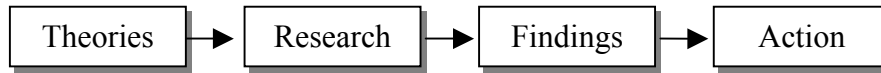


But, many of these jobs require minimal or no public contact. Jobs include: telemarketer, secretary, administrative assistant and mailroom clerk.

**Finding #5**

Service jobs are growing. Between March 1993 and March 2000 the city's private sector added jobs in every category except manufacturing. Construction showed the fastest growth, while services added the most jobs.





By following the VOC process, the NCOA program operators could confirm their theories, gain new knowledge, and take action based upon data.

**Action Items  
Based upon  
Customer  
Research**

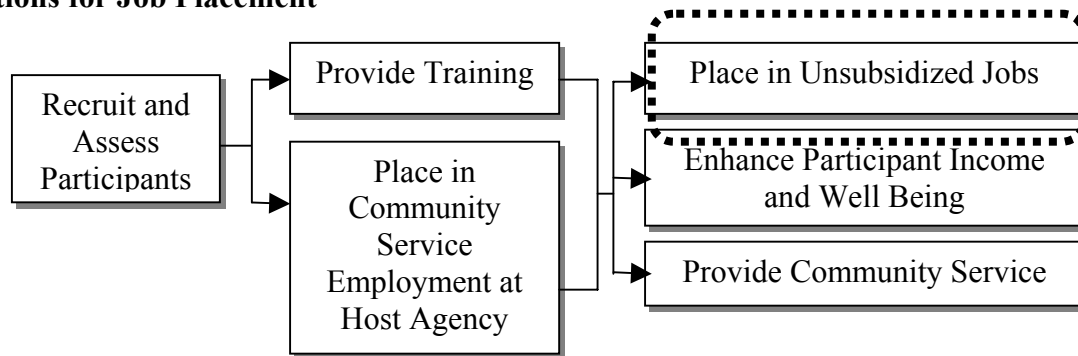


In New York the main action item was to add a customer service component to an existing training curriculum. The component incorporates the following recommendations made by employers:

- ☑ training in good customer service
- ☑ self-confidence
- ☑ professional demeanor
- ☑ positive attitude
- ☑ interpersonal communication skills
- ☑ ability to take directions from younger managers/supervisors
- ☑ team work
- ☑ understanding product line
- ☑ employer expectations
- ☑ understanding culture of company
- ☑ job-readiness training

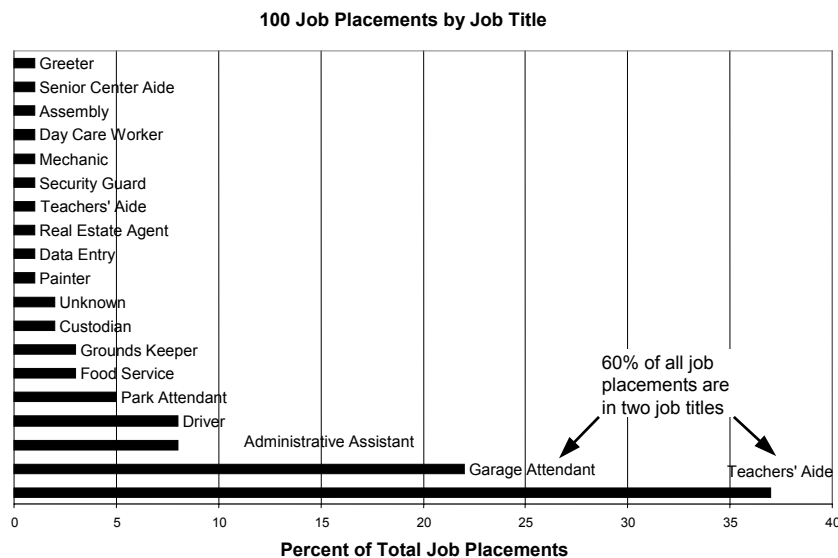
The NYC project concluded: “As businesses increasingly emphasize consumer satisfaction and customer relations, this strategy should work to the advantage of older workers, who are perceived as more skilled in interpersonal communication and in attending to customers. The employers we surveyed ranked good customer service as the number-one qualification for potential employees. There will be shortages of qualified workers for service jobs traditionally filled by younger workers. Employers will have to look to new sources of workers, including mid-career and older workers.”

### Applications for Job Placement

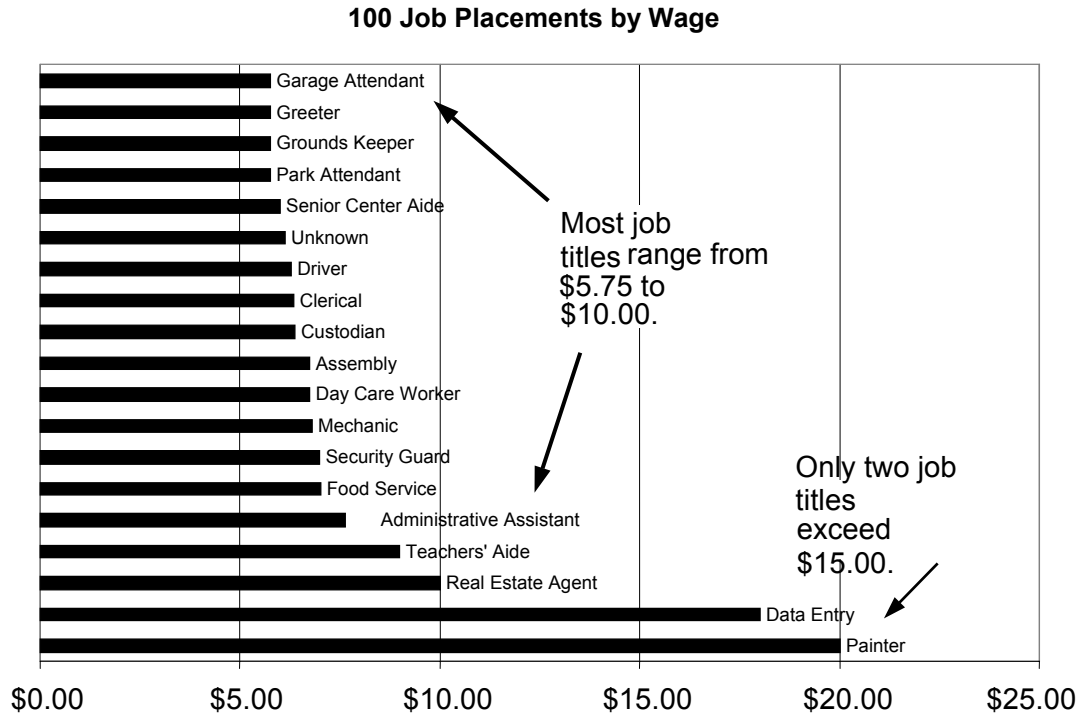


The Voice of the Customer training suggests that customer data come from many sources, not just surveys. During the Los Angeles Team workshop, we had an in-depth discussion of unsubsidized job placement and ways to determine the best opportunities in a local labor market. The outside consultant suggested that past behavior can sometimes predict future behavior and that it might be interesting to examine 100 of the last job placements to identify past trends.

The NCOA program in Riverside California (literally overnight!) analyzed 100 of their most recent job placements and supplied the following data.



The above chart showed that two categories (garage attendant and teachers' aide) accounted for almost 60% of all job placements. (This is often called a Pareto chart, in which most of the items are in a few categories.) The staff may have "known" that, but actually being able to see the data can lead to innovation. Looking at the data, we can then ask, "Should we push harder for garage attendants and teachers' aides? Why are those our best placement categories? What can we learn to apply in other areas? What are the wage levels?" This led to the next level of analysis.

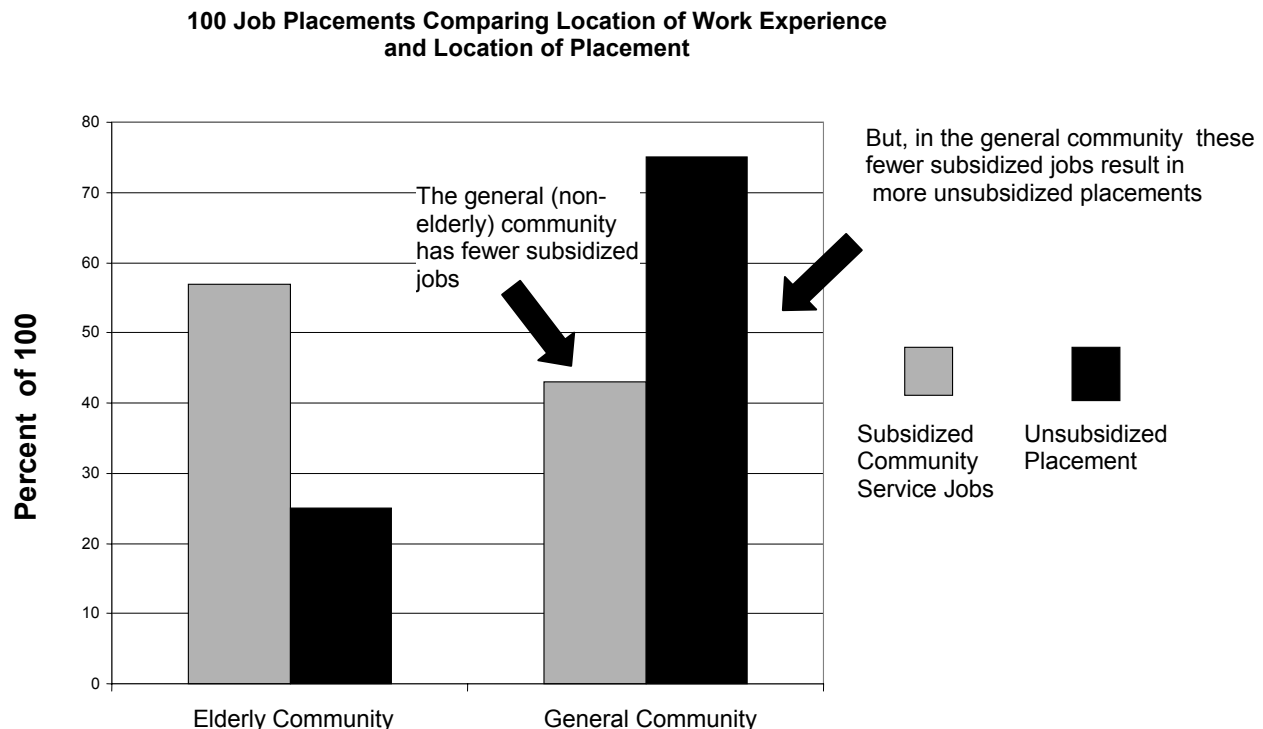


The wage chart shows that only two job titles pay over \$15 per hour. Teachers' aides are paid a respectable \$8 per hour, but our garage attendants are paid only \$6 per hour. So now we have data to support our theory that teachers' aides are a good job placement. It pays relatively well, and we tend to get numerous unsubsidized placements. Also, the data suggest we reconsider making referrals to the garage attendant position, which pays the lowest, only \$5.75. But other data gathered from discussions with staff reveal that in the case of Riverside, CA, the garage-attendant jobs are with a city garage, and government benefits go a long way to augment the \$5.75 hourly wage.

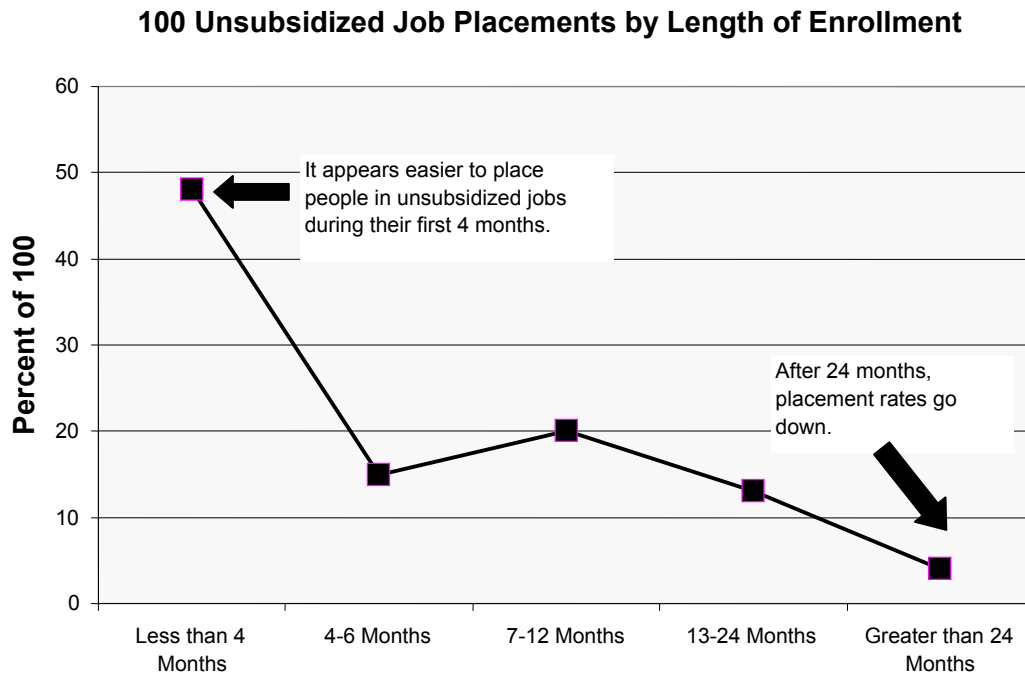
Also, the data suggest an obvious question, "Can we do more to encourage high-paying painter and data-entry jobs?" We learned from the late Dr. W. Edwards Deming (father of modern quality-management theory) that in order to manage for quality, we must know the difference between special and common causes of variation. To have two categories at the top of the wage scale is no surprise. In any wage scale, some job title is on top and another is on the bottom. We must be careful not to over-react to normal variation. Dr. Deming would call that "tampering." For example, to launch a program to train painters would probably be tampering. The fact that one painter is paid \$20 per hour may be just a random event.

Next, the Riverside, CA, team produced still another set of data. The chart below sets up two categories. The first involves host-agency community-service employment in the “elderly” community (with organizations that serve primarily senior citizens). The second involves community-service employment anywhere else (the general community).

The data show that, although about 58% of the community-service employment slots are with the elderly community, they provide only about 25% of unsubsidized placements. On the other hand, the general community receives only 42% of the community service slots while having 75% of the job placements. These data might lead us to theorize that slots with general community host agencies might lead to higher placements rates than slots with the elderly community.



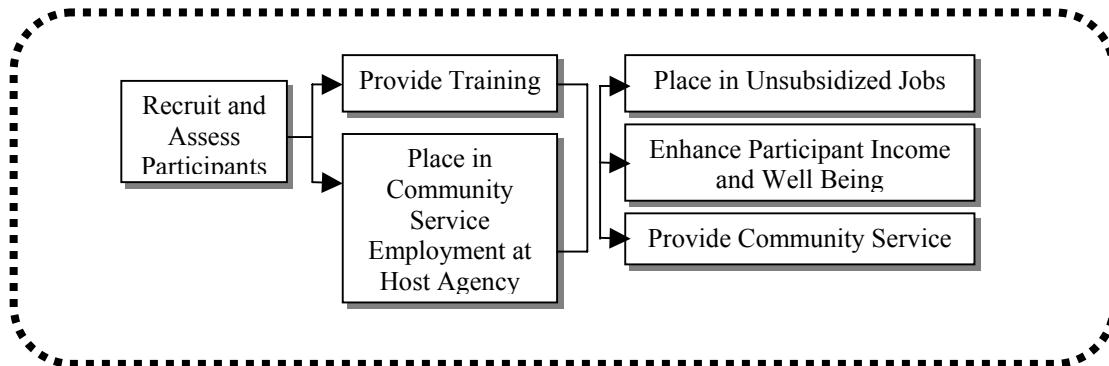
As we can see, a theory backed by data can lead to smart program-management decisions. The next data set leads us to still another theory. These data examine how long a person has been in the program before being placed in unsubsidized employment. It appears that of the 100 most recent placements, most (almost 50%) were made in the first four months of enrollment. After four months, we see a sizable drop in the unsubsidized placement rate. At 24 months, the unsubsidized placement rate falls even further. These data lead to the theory that “it is easier to place people in unsubsidized jobs during their first four months. After four months in the program, they are harder to place.”



In each of these charts, examination of data leads to theories about what quality-control experts call TSOTW (The True State Of The World). What is really going on here, and how can we use these data for program management? Data supporting a theory can lead to better policies. As part of this overall project, one of the challenges we discussed was how the Title V mission has expanded to include placement in unsubsidized employment. If program operators place too much emphasis on unsubsidized placement (by encouraging four-month subsidized community service job slots), will they be moving away from value-added community service? If a person works at a host agency for only four months, is he or she really adding value in so short a time?

Agency representatives involved in this project commented on the benefit of developing program-management theories and then gathering data to test these theories. Once a good theory is developed and supported by data, we have something we can use for true program improvement. This fundamental lesson of the Malcolm Baldrige National Quality Award is well demonstrated by team members in the SCSEP-VOC Project.

### Applications for Determining Participant Satisfaction



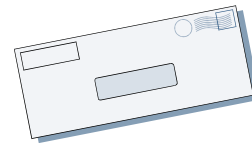
As part of the VOC process, it is also possible to determine participant satisfaction. In this case, we were looking at all aspects of the process model as shown above. AARP surveyed 143 participants in four projects, conducting surveys by phone, by mail and face-to-face.



**Face-to-face surveys** allowed the interviewer to develop rapport and watch body language.



**In telephone interviews** it was still possible to probe for deeper meaning.



**Through-the-mail surveys** allowed AARP to reach a larger population at a lower cost.

From these surveys we gathered 137 verbatim comments that were analyzed for fine-tuning the program. We learned that some participants wanted more training, others wanted longer assignments with host agencies, and others wanted higher wages. Customer comments can be typed onto 3x5 cards and then sorted into common categories. For example:



#### ***Computer Training***

*"Want more classes in computer training."*

*"Want more computer classes."*

*"Want more training on computers."*

#### ***Job Placement***

*"Want more job referrals."*

*"Want more posting of job leads."*

*"I've gotten no job-search help."*





## Voice of the Customer Project Members

- AARP Foundation
  - Michael Salesberry
  - Paul Mayrand
- Experience Works (formerly Green Thumb)
  - Elizabeth Fry
  - Lita Levine Kleger
  - Sally Boofer
- National Asian Pacific Center on Aging
  - Abha Shrestha
  - Hyung Moon
  - Janice Chu
  - Judy Yi
  - Kun Chang
  - Paul Jhin
  - Polly Chang-Colby
  - Shin Son
  - Walter Liang
- National Association for Hispanic Elderly
  - Julia Neidecker-Gonzales
- National Caucus and Center on Black Aged
  - Awad Dindiyal
  - Larry Crecy
- National Council on the Aging
  - Barbara Hoenig
  - Claudette Ramos-Wint
  - Don Capozzo
  - Don Davis
  - Donna Scanlon
  - Elvira Lovaglio-Duncan
  - Francis Scott
  - Glendale Johnson
  - Herbert Camlin
  - Janice Chu
  - John McGuire
  - Judith Richburg
  - Karen Shaffer
  - Larry Snider
- Luis Lopez
- Mark Dunlap
- Mary Rose Smith
- Miriam Casillas
- Robert Hall
- Roberta Alford
- Rose Russell
- Rosetta Brown
- Rosemarie Saladino
- Sonny Marks
- Tim Hamre
- Vicki Norman
- Wendy Packard
- National Indian Council on Aging
  - Frieda Clark
  - Maudean Harden
- Senior Service America (formerly National Senior Citizens Education & Research Center)
  - Anthony Chow
  - Barbara Littlejohn
  - Dee Cornelius
  - Dorinda Fox
  - George Ward
  - George Poon
  - Jack Bulmer
  - Javier Nunez
  - Joan Fotinatos
  - Joanne Waters
  - Judith Kleve
  - Martin Rosenblum
  - Mary Curran
  - Michele Everett
  - Mildred Campbell
  - Molly Chavarria
  - Pauline Bell
  - Rene Wade
  - Robert Maestre
  - Rosa Loya
  - Terry Reynolds
  - Valdes Snipes-Bennett
  - Wai Fang Zhou

- National Urban League  
Agustin Manaloto  
John Gittens  
Juanita Thorpe  
Marian Noel  
Ralph Carpenter  
Robert Mizerak
- State of Maryland  
Karen Fields  
Ruth Peterson
- United States Department of Labor  
Bryan Rogers  
Erich Larisch  
Gale Gibson  
Margaret Erickson  
Vic Trunzo
- ARBOR, Inc.  
David M. Saunders

Administrative Support provided by  
NCOA

Consulting and Training provided by  
ARBOR, Inc., Media, PA  
([www.arborinc.com](http://www.arborinc.com))

### **Voice of the Customer training materials come in two booklets.**

#1 The Voice of the Customer  
Guidebook

#2 The Voice of the Customer  
Workbook

Copies of these training booklets are  
available on-line at:  
[www.workforce-excellence.net](http://www.workforce-excellence.net)

### **Additional References**

Amsden, Robert, *SPC Simplified, Practical Steps to Quality*, Quality Press, New York, 1998. (A how-to manual on control charts.) (To order call the

American Society for Quality at 800-248-1946.)

Brassard, Michael and Ritter, Diane, *The Memory Jogger™ II*, GOAL/QPC, Lawrence, MA, 1994. (For help with control charts.) (To order call GOAL/QPC at 603-890-8800.)

Cleary Ph.D., Michael, *SQCpack PQ Systems*, Dayton, Ohio. (Statistical Process Control software for Windows) (To order call PQ Systems at 800-777-3020.)

Hayes, Bob, *Measuring Customer Satisfaction*, Quality Press, Milwaukee, 1998. (For help with surveys.) (To order call the American Society for Quality at 800-248-1946.)

Latzko, William and Saunders, David, *Four Days with Dr. Deming*, Addison-Wesley, Reading, MA, 1995. (For a discussion of tampering.) (To order contact [www.amazon.com](http://www.amazon.com))

Langford, David and Cleary, Barbara, *Orchestrating Learning with Quality*, Quality Press, Milwaukee, 1995. (For help with using quality improvement with education.) (To order call the American Society for Quality at 800-248-1946.)

## Part III. Appendices

### Contents

#### Appendix A. Program Documentation

Page	Agency	Description
Appendix A-1	National Asian Pacific Center on Aging (NAPCA)	Customer Segmentation Profile Matrix
Appendix A-2	National Council on the Aging (NCOA)	Interview guide to study satisfaction on the part of local program directors with services and technical support from national sponsor
Appendix A-4	National Indian Council on Aging (NICOA)	Survey to determine what tools and skills are needed by staff to be better at job placement
Appendix A-5	National Urban League (NUL)	Survey of participants regarding employability workshops
Appendix A-6	National Senior Citizens Education & Research Center (NSCERC)	This table shows the entire process from staff opinions (theories), customer research, and finally action items
Appendix A-7	National Asian Pacific Center on Aging (NAPCA)	Host Agency Individual Development Plan (IDP)
Appendix A-8	National Council on the Aging (NCOA)	Paperwork Checklist
Appendix A-9	National Association for Hispanic Elderly	Best Practices in Job Placement

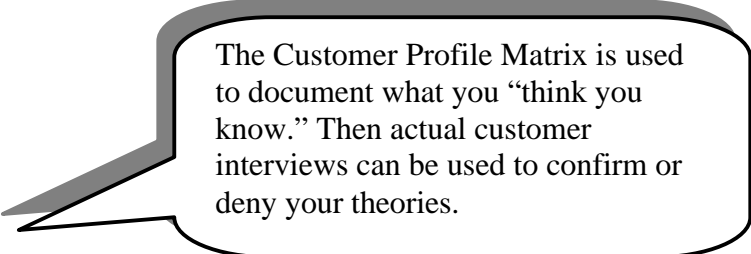
#### Appendix B. SCSEP Guide for Measuring and Improving Customer Satisfaction

Appendix B-1	Step 1.0	Defining Our Customers
Appendix B-3	Step 2.0	Hearing the Voice of Our Customer
Appendix B-10	Step 3.0	Interpreting the Voice of Our Customer
Appendix B-15	Step 4.0	Improving Our Organization



## **Program Documentation**





The Customer Profile Matrix is used to document what you “think you know.” Then actual customer interviews can be used to confirm or deny your theories.

Customer Segmentation Profile Matrix NAPCA LA			
Segment	Segment 1	Segment 2	Segment 3
Description	Difficult-to-place enrollees	Host agencies that don't hire SCSEP enrollees into unsubsidized jobs	Mainstream employers
Segment size, demographics	<ul style="list-style-type: none"> <li>majority</li> <li>65-75 years old</li> <li>don't drive</li> <li>non-English speaking</li> <li>female</li> </ul>	<ul style="list-style-type: none"> <li>mainstream</li> <li>need English-speaking</li> <li>non-profit</li> <li>can't hire</li> </ul>	<ul style="list-style-type: none"> <li>for profit</li> <li>private</li> <li>large</li> <li>need English-speaking</li> </ul>
What they want:	<ul style="list-style-type: none"> <li>money</li> <li>keep active</li> <li>job</li> <li>feel needed</li> <li>feel responsibility</li> </ul>	<ul style="list-style-type: none"> <li>free labor</li> <li>reliable enrollee</li> <li>English speaking enrollee</li> <li>trainable enrollee</li> <li>low involvement</li> </ul>	<ul style="list-style-type: none"> <li>reliability</li> <li>responsibility</li> <li>full-time</li> <li>trainability</li> <li>English-speaking</li> </ul>
What they get:	<ul style="list-style-type: none"> <li>money</li> <li>job training</li> <li>benefits</li> <li>activity</li> <li>respect</li> </ul>	<ul style="list-style-type: none"> <li>free labor</li> <li>reliable enrollee</li> <li>English-speaking enrollee</li> <li>trainable enrollee</li> <li>low involvement</li> </ul>	<ul style="list-style-type: none"> <li>employee referrals</li> <li>free recruitment</li> <li>reliable older workers</li> </ul>
How the customer uses our product and services:	<ul style="list-style-type: none"> <li>financially</li> <li>educationally</li> <li>socially</li> </ul>	<ul style="list-style-type: none"> <li>reduced spending</li> <li>free labor</li> <li>training grounds to hire</li> <li>reduced workload</li> </ul>	<ul style="list-style-type: none"> <li>free recruitment</li> <li>hire new employees</li> <li>contact</li> </ul>

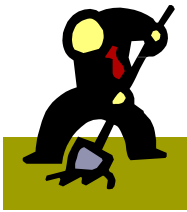
**Source: National Asian Pacific Center on Aging (NAPCA)**

<b>NCOA Program Operator Interview Guide</b>	
<p><b>Opening conversation:</b></p> <p>We are trying to determine the effectiveness of NCOA headquarters in providing management support to enable you to carry out your duties effectively.</p> <p>Today I am functioning as a researcher. I intend to listen to what you have to say. We need your honest answers to the survey. We will not identify your responses with your name.</p>	<p><b>Date:</b></p> <p><b>Interviewer:</b></p>
<p>1. <b>General Question:</b> How can NCOA as a national sponsor better assist you in the implementation of your Title V Program? (Write response)</p>	<p>Probe: (Write response)</p>
<p>2. <b>Likes:</b> What do you like most about the current support you receive from NCOA? (Write response)</p>	<p>Probe: (Write response)</p>
<p>3. <b>Dislikes:</b> What do you like least about the support you receive? (Write response)</p>	<p>Probe: (Write response)</p>

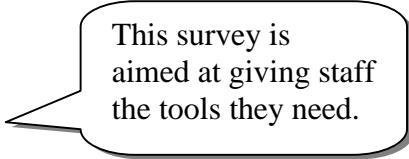
Interview Guide follows the format of:

1. General questions
2. Likes
3. Dislikes
4. Specific questions
5. Sensitive questions
6. Anything else question



4a. <b>Specific:</b> What do you need from NCOA to achieve your performance goals and objectives? (Write response)	Probe: (Write response)
4b. <b>Specific:</b> Do you need assistance with <ul style="list-style-type: none"> <li>• Program management</li> <li>• Program planning</li> <li>• Fiscal management</li> <li>• Use of computers</li> <li>• Communication</li> <li>• Training</li> <li>• Technical assistance</li> <li>• Mechanism for sharing best practices</li> </ul>	Probe: (write response) <div data-bbox="1003 478 1318 1016" style="border: 1px solid black; border-radius: 15px; padding: 10px; margin-top: 20px;"> <p>In question 4b, the interviewer can really dig into the details of program operation.</p>  </div>
5a. <b>Sensitive:</b> Do you have any suggestions on how NCOA headquarters can better use its limited resources? (Write response)	Probe: (write response)
5b. <b>Sensitive:</b> Do you have suggestions on how <i>you</i> can better use <i>your</i> resources? (Write response)	Probe: (write response)
6. <b>Anything else:</b> Do you have any other comments? (Write response)	Probe: (write response)
<b>Summary:</b> Summarize the interview to the customer. Include a statement regarding the confidentiality of the interview, if appropriate. Close by expressing your thanks and appreciation for the interview.	

**Source:** National Council on the Aging (NCOA)



This survey is aimed at giving staff the tools they need.

**Interviewers: NICOA National Program Managers**

**Respondents: SCSEP staff**

**Purpose: To determine what SCSEP staff needs to better help participants find jobs.**

1. In general, what do you think of our ability to make unsubsidized job placements?
2. What, if anything, do you like about the training you have received on making successful placements?
3. What, if anything, do you dislike about the training you have received on making successful placements?
4. What should be included in the training to assist you with your placement efforts?
5. Of your successful placements, what do you consider the most important factors? (Skills, education, labor market, other.)
6. Do you think “job-seeking skills” workshops for participants would contribute to increased placements? Why or why not?
7. Do you think your current training sites are providing adequate training that would lead to placement, either at the site or elsewhere? Why or why not?
8. Of your best training sites, what characteristics make them excel?
9. What is your opinion of the quality of training received to-date on writing individual development plans (IDPs)?
10. Have you received adequate training/tools to enable you to develop good placements? Explain.
11. What factors contributed to your last several placements?
12. If you have not made your placement goal, what factors prevented you from doing so?
13. What additional information and/or training would assist you in developing increased placements?

**Source: National Indian Council on Aging (NICOA)**

### Evaluation by NUL SCSEP Participants Completing Employability Workshops

**Introduction:** Your opinion is very important to us. We want to provide you with the best possible services to meet your training needs. Please allow me the time to complete this survey with you, as it is very important to us. Thank you.

Please rate the following questions as follows:

0 = do not know,      1 = poor,      2 = fair,      3 = good,      4 = excellent

- |           |     |   |
|-----------|-----|---|
| 0 1 2 3 4 | 1.  | I understood the reason for attending the employability workshop.                   |
| 0 1 2 3 4 | 2.  | I found the information from the employability workshop helpful.                    |
| 0 1 2 3 4 | 3.  | The presentations were interesting.   |
| 0 1 2 3 4 | 4.  | The presentations were helpful.   |
| 0 1 2 3 4 | 5.  | The instructor(s) seemed well prepared.   |
| 0 1 2 3 4 | 6.  | The instructor(s) seemed knowledgeable about the material.                          |
| 0 1 2 3 4 | 7.  | The pace of the class was appropriate.  |
| 0 1 2 3 4 | 8.  | The number of people in the workshop was appropriate.                               |
| 0 1 2 3 4 | 9.  | The training materials (e.g. application, resume) that I received were appropriate. |
| 0 1 2 3 4 | 10. | The frequency of the workshops was appropriate.                                     |

**Interviewer: Record responses on index cards for the following:**

11. What specific topic could we have focused on more? (E.g., resume writing, the job application process, interviewing skills, dress.)

12. How many participants should be in the workshop?

13. How did the employability workshop benefit you the *most* in your job search?

14. How did the employability workshop benefit you the *least* in your job search?

15. What was the *most* important thing you learned?

16. What was the *least* important thing you learned?

17. What suggestion do you have to improve the employability workshop?

**Source: National Urban League  
(NUL)**

From question 17, the staff learned that their module on “dress for success” was aimed more at young people than at seniors.

Here you can see the entire process starting with theory (the opinions of staff), customer research and action plans for improvement.

Theory	Research Findings	Actions
<p>Enrollees two or more years in the NSCERC program who are skilled and job-ready, are usually unmotivated, discouraged and satisfied at staying at host agency.</p>	<p>Of the 18 enrollees interviewed</p> <ul style="list-style-type: none"> <li>• 100% (18) were actively looking for employment.</li> <li>• 22% (4) had interviewed and were motivated.</li> <li>• 39% (7) hoped to be hired by the host agency.</li> <li>• 72% (13) felt that age was a significant barrier to employment.</li> <li>• 28% (5) felt that getting a better paying job would mean loss of housing and/or medical benefits.</li> <li>• In programs without job developers, 66% wanted job development.</li> </ul>	<ul style="list-style-type: none"> <li>• In one program, change Thursday off to Monday off so that enrollees can look for jobs in a Sunday newspaper.</li> <li>• Job developer will inform potential employers and advocate on enrollees' behalf before sending enrollees on interviews.</li> <li>• Change in "program" practice: reassign enrollees every 6 months to host agencies.</li> <li>• Program that does not have a job developer: hire job developer/senior enrollee to assist with job development.</li> <li>• Assist host agencies to identify tax incentives and financial incentives via federal government, available to potential employers.</li> <li>• Advocate to government housing and agencies to raise cap for medical/housing income eligibility.</li> </ul>

Source: NSCERC, New York

Individual Development Plans (IDPs) are used extensively for participants. Why not use for Host Agencies? NAPCA LA developed this “best practice.”

**SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM  
HOST AGENCY  
INDIVIDUAL DEVELOPMENT PLAN  
FOR NON-PROFIT ORGANIZATIONS OR GOVERNMENT AGENCIES**

Organization Name	Enrollee Name	Assignment Title

**TYPE OF PLACEMENT**

	Check one
Expansion of Organizational Services	<input type="checkbox"/>
Regular Position Opening	<input type="checkbox"/>
Create a New Position	<input type="checkbox"/>
Pre-Agreed Placement	<input type="checkbox"/>
Other (please explain)	<input type="checkbox"/>

**TYPE OF TRAINING PROVIDED**

What Type of Training is Provided? \_\_\_\_\_

\_\_\_\_\_

What Type of Specific Skills Would be Learned Through Training? \_\_\_\_\_

\_\_\_\_\_

Certification(s) to be Provided: \_\_\_\_\_

Please Indicate How Long the Training Would Take

*Months*

1    2    3    4    5    6    7    8    9    10    11    12

**PROJECT ADMINISTRATION INFORMATION**

Who Does the Hiring in this Organization? \_\_\_\_\_

\_\_\_\_\_

What are the Current Sources of Funding? \_\_\_\_\_

\_\_\_\_\_

Planned Date of Hire: \_\_\_\_\_  
*month/year*

\_\_\_\_\_  
Signature of Host Agency Supervisor      Date

\_\_\_\_\_  
Signature of Project Director      Date

**Source: National Asian Pacific Center on Aging (NAPCA)**

**PAPERWORK CHECKLIST SHEET****PROGRAM****MONITOR** \_\_\_\_\_

This checklist assures that each participant's paperwork is complete. This is the type of "best practice" that can be part of a Title V Learning Community.

**Participant's Name** \_\_\_\_\_**Initial** \_\_\_\_\_**Enrollment** \_\_\_\_\_ **Re-Enrollment** \_\_\_\_\_ **Reassignment** \_\_\_\_\_ **Termination** \_\_\_\_\_**Placement** \_\_\_\_\_ **502(e)** \_\_\_\_\_ **Recertification** \_\_\_\_\_ **Address/Change** \_\_\_\_\_**Enrollment**

Paperwork Checklist Sheet \_\_\_\_\_

Participant Data Form \_\_\_\_\_

Participant's Confidential Income Statement \_\_\_\_\_

Federal W-4 \_\_\_\_\_

State Income Tax Form \_\_\_\_\_

Orientation Checklist \_\_\_\_\_

Beneficiary Statement \_\_\_\_\_

I-9 \_\_\_\_\_

Enrollment Agreement \_\_\_\_\_

Employment Assessment/IDP \_\_\_\_\_

Training Description/Schedule \_\_\_\_\_

Participant Information Form \_\_\_\_\_

Medical Statement/Memorandum \_\_\_\_\_

In-Kind \_\_\_\_\_

Direct Deposit \_\_\_\_\_

**Recertification**

Paperwork Checklist \_\_\_\_\_

Recertification Form \_\_\_\_\_

Confidential Income Statement \_\_\_\_\_

Medical Statement \_\_\_\_\_

**Enrollment Training Site Info.**

Training Site Agreement (if new) \_\_\_\_\_

SCSEP Training Site Form (if new) \_\_\_\_\_

501 (c) 3 (if needed) \_\_\_\_\_

In-Kind Agreement \_\_\_\_\_

**Work Experience 502(e)**

Paperwork Checklist \_\_\_\_\_

Participant Data Form \_\_\_\_\_

Participant Information Form \_\_\_\_\_

Training Description Schedule \_\_\_\_\_

Work Experience Agreement \_\_\_\_\_

**Other**

IDP Review \_\_\_\_\_

Quarterly Summary Report \_\_\_\_\_

**Reassignment**

Training Site: From: \_\_\_\_\_ To: \_\_\_\_\_

Transfer Date \_\_\_\_\_ Training Description Schedule \_\_\_\_\_ Participant Information Form \_\_\_\_\_

Training Site Agreement (if new) \_\_\_\_\_ SCSEP Training Site Form (if new) \_\_\_\_\_

501 (c)3 \_\_\_\_\_ In-Kind \_\_\_\_\_ Orientation Checklist \_\_\_\_\_ Participant Data Form \_\_\_\_\_

**Termination**

Termination/Placement Form \_\_\_\_\_

Resignation Statement \_\_\_\_\_

**Termination/Placement**

Termination/Placement Form \_\_\_\_\_

All placement information complete \_\_\_\_\_

**COMMENTS** \_\_\_\_\_

***Best Practices in Job Placement***

The success of a high number of unsubsidized job placements in the SCSEP Program can be attributed to a number of factors, including:

- A high level of expectation is placed on both enrollees and host agencies with respect to unsubsidized job placements.
- Upon entrance to the SCSEP program, a resume is prepared for each enrollee and a copy is given to the Host Agency supervisor the moment the enrollee is placed. This way the supervisor has a clear picture of the enrollee's work history and the strengths that the enrollee can bring to the agency, should a job opening develop.
- The job developer/program coordinator meets one-on-one with the host agency supervisors in an informal setting (for lunch, for example) to inquire who at the agency ultimately has the authority to hire the enrollee. Then a meeting is arranged with that person to market the enrollee to the agency for an unsubsidized placement. This is done on a regular basis.
- The Program Coordinator bookmarks the typical job categories for which the enrollee qualifies on the Internet, so that a weekly search to download jobs is quick and efficient.
- As soon as the enrollee is ready to start the job search, the Program Coordinator arranges and attends interviews with the enrollee so that strong verbal recommendations are given to potential future supervisors. It is a big help to the enrollee if the Program Coordinator/Job Developer attends the interviews, especially if there is a language barrier.
- For those enrollees who have worked at a host agency for more than 3 months and have an outstanding work attendance and work ethic, the Program Coordinator suggests that future employers contact the current host agency supervisor to get a positive recommendation.
- An enrollee who has secured employment acts as mentor for future enrollees; the Program Coordinator stays in touch with the mentor to place additional enrollees in the same company. The key here is consistent follow-up with both employed enrollees and prospective employers.
- The Program Coordinator regularly develops new host agencies and terminates host agencies that have never hired, so that there is always fresh energy in the program with people who want to hire our enrollees.

**Source: National Association for Hispanic Elderly**





## **SCSEP Guide for Measuring and Improving Customer Satisfaction**

Appendix B to the Voice of the Customer has been designed to be used independently for training, conferences, or individual use. Copies of Appendix B can be obtained on line at [wdsc.doleta.gov/seniors](http://wdsc.doleta.gov/seniors) (Click Bulletins and Memos, then click Older Worker Technical Assistance Guides.) or contact the Division of Older Worker Programs at 202-693-3842.

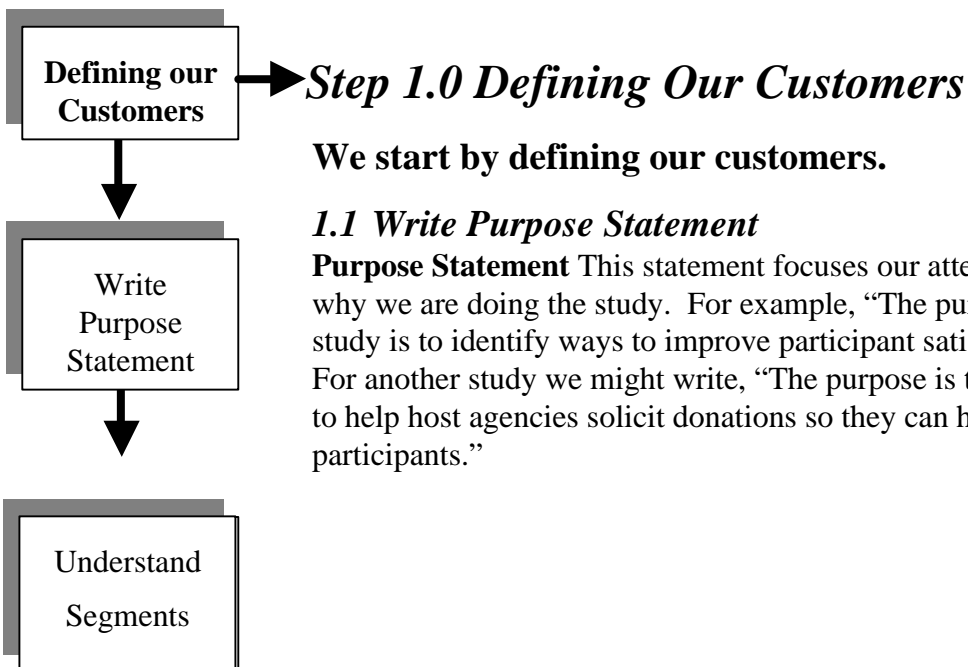
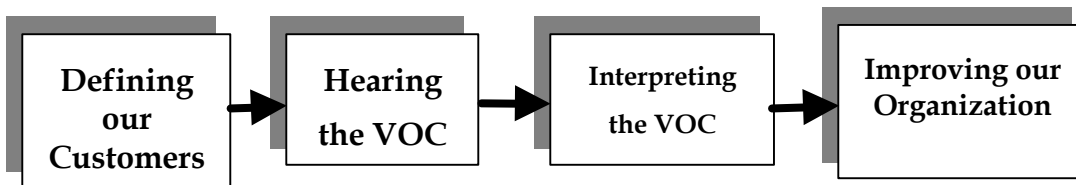


## SCSEP Guide for Measuring and Improving Customer Satisfaction

### Appendix B

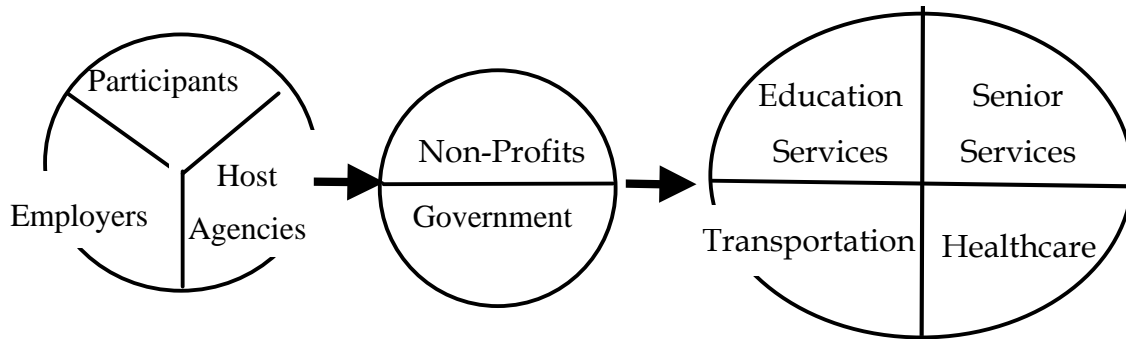
#### Instructions

This Guide provides SCSEP program operators with tools for hands-on “do-it-yourself” customer-satisfaction research. It shows a roadmap for studying customers, identifying likes and dislikes, exploring specific program components and obtaining a tracking measure of overall satisfaction. The overall process is shown below:



## 1.2 Understand Segments

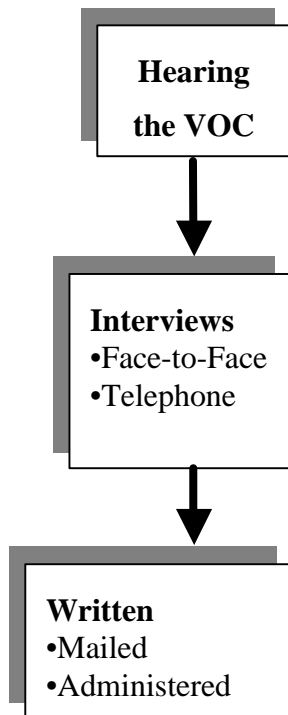
**Segmentation Pie Chart** Arranging customers into groups is called segmentation. SCSEP programs have three primary segments (participants, host agencies and employers). Segments can then be broken out into sub-segments as shown below.



Customer Segmentation Pie Chart

Host agencies are segmented into non-profits and government. They can also be segmented by the type of service. For a project, we may then focus on a specific segment, such as host agencies that provide healthcare services.

## *Step 2.0 Hearing the Voice of Our Customer*



### *2.1 Gathering Customer Data.*

An easy to use survey is provided for each of three key segments (participants, host agencies and employers). (See three surveys at end of this section.) These surveys can be administered as an interview or in written form.

**Interviews** are a conversation to obtain information.

- **In face-to-face interviews** we are talking directly to customers. If it is an employer, we are probably at his/her place of business. If it is a participant, we might be interviewing him/her in our office or at the host agency. If the customer is the host agency director, then we are probably at his/her office.
- **Telephone interviews** are the same as the above, except carried out by telephone.

**Written questionnaires** ask the same questions, but are in written form.

- **Mailed questionnaires** are sent to participants, host agencies or employers along with a self-addressed envelope.
- **Administered questionnaires** are handed out in a classroom or at a worksite. The advantage is that they can be filled in immediately and returned, so that the response rate is higher.

### *2.2 The Questions We Ask.*

In the face-to-face or telephone interviews, we ask key questions and probe for deeper meaning. In the written format, we ask participants to write their “top-of-mind” responses.

**Opening:** Explain the purpose of the study.

**1. General question:** Ask a general question to provide an icebreaker and help the customer begin to think about the topic.

**2. Likes:** The “like question” tells us what is important, what they want and also tells our strengths.

**3. Dislikes:** The “dislike question” tells us what they don’t want, what we are not good at and what we might improve or discontinue.

**4. Specific:** Based upon our overall purpose, we ask specific questions about our program, such as:

- “Please comment on our IDP process.”
- “Please comment on our career counseling.”
- “Please comment on our job placement”
- “Please comment on our host agency training ”
- “Please comment on our resume preparation assistance.”

**5. Satisfaction:** This is our only quantitative (numeric) question. It asks for overall satisfaction.

**6. Anything else:** This is a catchall question to see what was missed.

### **Tips for Writing Questions**

- Ask ourselves, “How will we use this information?”
- Write simple questions.
- Avoid theoretical, leading and complex questions.
- Sequence questions in a logical flow. We may first ask, “Have you been on a job interview?” and then ask, “What did you like, if anything, about your first job interview?” If we asked them to comment on a job interview before they have one, the participant would get confused.
- Ask only what we really need to know.
- Pretest the questions with friendly customers.

### **Tips for Conducting a Customer Interview**

- Set an appointment at the customer’s convenience.
- Create a friendly, informal atmosphere.
- Use the questions to keep the interview on track.
- Begin with an introduction explaining the purpose.
- Probe meanings. We ask the “why” in different ways until we really understand the customer’s thinking. (Why did you like that? Tell me more. Why is that important? Why did that happen? Could you please explain that again? Why do you think that occurred?)
- Don’t be defensive. Be open to hearing the good and the bad.
- Pace the interview. Observe body language.
- Tell the customer what the follow-up action will be.
- Summarize the interview and thank the customer.
- Remember in SCSEP we are talking to seniors; some may wear hearing aids and may have trouble hearing us, others may have frail voices and we may have trouble hearing them.

### Tips for Taking Notes

- Do not pre-judge customer responses.
- Write customer comments — what people actually say, quote key words, phrases and descriptions.
- Use the interview guide to take notes; if additional writing space is needed and you go to blank-writing paper, remember to relate notes to the appropriate question.

### Tips for Mailed Questionnaires and Administered Written Questionnaires

- We can use the same six questions on the survey forms provided, but leave plenty of room for written responses.
- We need to pre-test our questionnaires to make sure our wording is clear and understandable. Remember we won't be there to watch for a confused look or to hear a question.

**Note: An administered written questionnaire is when we hand customers the questionnaire and they write their answers in our presence. This has many advantages. First, we can immediately collect the questionnaires, so our response rate will be higher (this gives us data that are more reliable). Also, using an administered questionnaire we are able to immediately address any confusion. Administered questionnaires are a good choice for SCSEP participants and host agencies. (Just hand the questionnaire to the host agency director and ask him or her to place the response in a sealed envelope.)**

## 2.3 Sampling

In conducting research we can select a representative sample to reduce the cost and time involved. Sampling must be random. This means that each person in the population has an equal chance of being chosen. Here are some guidelines for determining sample size.

Number of customers in the segment.	<5	5-19	20-49	50-99	100+
Number of customers for personal interviews.	ALL	5	7	8	9-20
Number of customers for written questionnaires.	ALL	5	10	12	15-25

In addition, we must decide how often to conduct a customer survey.

- **Option One: Annual Survey.** This could be conducted each year (or semi-annually).
- **Option Two: Ongoing Tracking.** This is a more frequent survey that can be conducted weekly, monthly or at the end of each class. An easy way to get started is to draw small samples but to do it on a continual basis. Consider a small sample of 10 respondents, 10 host agencies or 10 employers.

**Response rate** refers to the percentage of people we contact who actually complete their interview/survey. Because the number to interview and survey is generally small, the key is to get responses from each person in the sample.

**Fielding the survey** involves duplicating and controlling the questionnaires, recruiting respondents, getting correct addresses if a through-the-mail method is used, or obtaining correct telephone numbers if surveying over the phone.

A word of advice: try to find a Title V participant who is experienced or interested in customer research to conduct the interviews. If you do not have someone inside, look for someone on the outside. Ask a local college or a business school for help, often there are students who need to conduct a research project before they can graduate.



Find that person who really wants to do a customer-research project.

Following are three sample interviews. Feel free to modify these to fit your purpose.

- Participant Satisfaction Survey
- Employer Satisfaction Survey
- Host Agency Satisfaction Survey



**Participant Satisfaction Survey**

<b>Opening:</b> We are working to improve our program operations and would appreciate your honest opinions.	
1. In general, please tell me about your experience with the _____ program.	
2. What, if anything, did you like about the program?	Please explain.
3. What, if anything, did you dislike about the program?	Please explain.
4. Please comment on the following specific aspects of the program? _____ _____ _____	
5. Overall, how would you rate your satisfaction with the program? Were you: <input type="checkbox"/> Very satisfied <input type="checkbox"/> Satisfied <input type="checkbox"/> Dissatisfied <input type="checkbox"/> Very dissatisfied	
6. Is there anything else you could tell us so we can improve this program?	

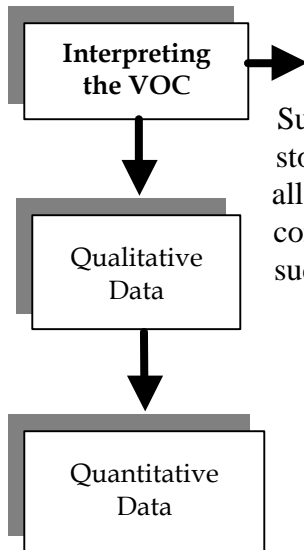
**Host Agency Satisfaction Survey**

<b>Opening:</b> We are working to improve our program operations and would appreciate your honest opinions.	
1. In general, please tell me about your experience with the _____ program.	
2. What, if anything, did you like about the program?	Please explain.
3. What, if anything, did you dislike about the program?	Please explain.
4. Please comment on the following specific aspects of the program? _____ _____ _____	
5. Overall, how would you rate your satisfaction with the program? Were you: <input type="checkbox"/> Very satisfied <input type="checkbox"/> Satisfied <input type="checkbox"/> Dissatisfied <input type="checkbox"/> Very dissatisfied	
6. Is there anything else you could tell us so we can improve this program?	

**Employer Satisfaction Survey**

<b>Opening:</b> We are working to improve our program operations and would appreciate your honest opinions.	
1. In general, please tell me about your experience with the _____ program.	
2. What, if anything, did you like about the program?	Please explain.
3. What, if anything, did you dislike about the program?	Please explain.
4. Please comment on the following specific aspects of the program? _____ _____ _____	
5. Overall, how would you rate your satisfaction with the program? Were you: <input type="checkbox"/> Very satisfied <input type="checkbox"/> Satisfied <input type="checkbox"/> Dissatisfied <input type="checkbox"/> Very dissatisfied	
6. Is there anything else you could tell us so we can improve this program?	

### Step 3.0 Interpreting the Voice of Our Customer



#### Step 3.1 Analyzing Word Data

Survey questions #1, 2, 3, 4, and 6 will give us comments, such as: stories, anecdotes, suggestions, and quotes. The first step is to review all of these comments and select key comments for further analysis. Key comments can then be analyzed using a Voice of the Customer Table, such as the one below:

In the first column we write key customer comments. Then we interpret what it means; often the meaning is obvious. Sometimes we must check with customer for clarification. In the third column, we make a judgment. “What does this comment mean to us? How important is it?” Finally, in the fourth column, we describe what action, if any, we might take. The fourth column will feed into our Project Management Worksheet.

Voice of the Customer Table			
What did the customer say? (Key Comments)	What did the customer mean?	What does it mean to our agency?	What action, if any, shall we take? (Project Worksheet)
“We need security guards.” (ABC company, HR Manager)	There is a shortage of people willing or qualified to take these jobs.	We could create a program in this area, but frankly, it is not something in which we have expertise.	No Action
“We need a ‘sitter’ for mentally ill people who are recovering from surgery.” (ABC Hospital, Chief of Nursing)	There is a shortage of people willing or qualified to take these jobs.	This unique area is worth exploring because we have many participants in healthcare agencies.	Send job developer to hospital for more information.
“Your paperwork is a burden.” (ABC Host Agency, Executive Director)	Something is upsetting about our paperwork.	This is usually not a problem for us; maybe they have some new staff we have to train.	Send monitor to site to investigate and report.

(A blank Voice of the Customer Table is provided.)

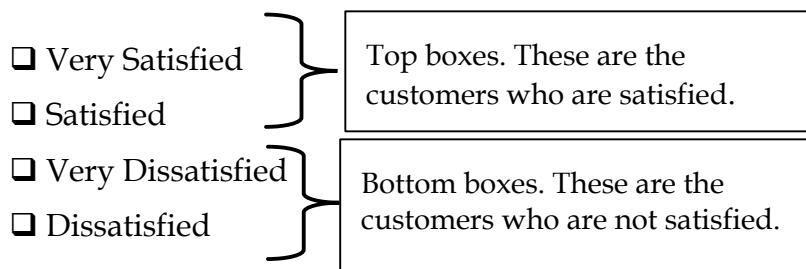
Voice of the Customer Table			
What did the customer say? (Key Comments)	What did the customer mean?	What does it mean to our agency?	What action, if any, shall we take? (Project Worksheet)

### Step 3.2 Analyzing Numeric Data

Question 5 is a quantitative question, often called the “global satisfaction” question. It asks: “Overall, how would you rate your satisfaction with the program, were you:

- ☐ Very satisfied
- ☐ Satisfied
- ☐ Dissatisfied
- ☐ Very dissatisfied”

If 20 participants were asked this question, we might obtain the following answers:



Ratings	Participants	Percents	
Very satisfied	6	30%	80% Top boxes (Satisfied)
Satisfied	10	50%	
Dissatisfied	3	15%	20% Bottom boxes (Dissatisfied)
Very dissatisfied	1	5%	
Total Participants	20	100%	

This shows that 6 participants said they were “very satisfied,” 10 were “satisfied,” 3 were “dissatisfied” and 1 was very dissatisfied.” We next calculate the percentages as follows:

6 of 20 participants were “very satisfied”

6 divided by 20 equals .30

To convert .30 to a percentage multiplying .30 by 100

So .30 times 100 equals 30%

If we add the 30% who were “very satisfied” and the 50% who were “satisfied,” we have a total of 80% in our top-boxes. This means that 80% of our customers are generally satisfied with our services.

If we calculate the average for the same 20 participants we get a satisfaction score of 3.05. What does that mean? Isn’t it clearer to say, “80% of our customers were satisfied,” rather than to say

“We have an average satisfaction level of 3.05”? Professional market researchers prefer to use top-boxes rather than averages.

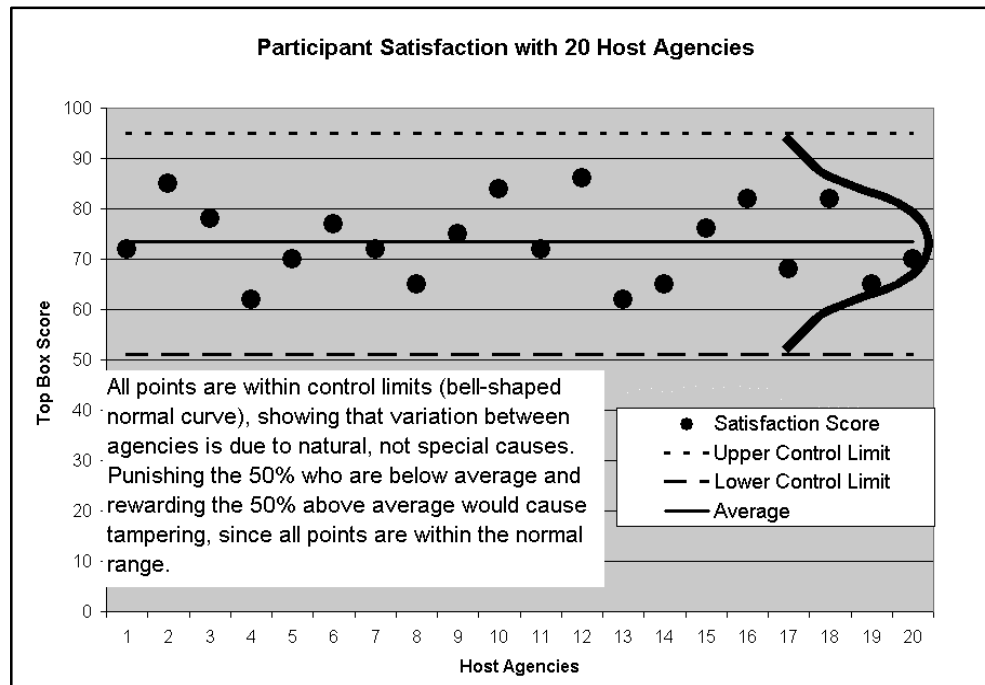
Now that we can determine our top-box scores for customer satisfaction we can plot these scores on graph paper.

If we have a regular training workshop we might give the survey to each participant and then track the scores over several cycles. We then plot the scores on a graph and see if there is a trend, as in the example below:



### Tips for Handling Satisfaction Scores

- For SCSEP program operators it is generally expected that most improvements will come from analysis of the key customer comments.
- Although you may be collecting satisfaction scores, this is not mandatory. Satisfaction scores are mainly used for tracking improvements. Be cautious not to over-react to minor changes in the numbers.
- For example, in the chart below there are differences in scores of host agencies, but when statistical tools are applied, we see that the differences are not significant, just natural variation.



When satisfaction scores are stable (as in the chart above), management must be careful not to “tamper.” An example of tampering is the declaration that “all programs below average must improve.” This causes below average programs to issue policies, reprimands, and re-assignments, often with little benefit. The ones above average receive undeserved rewards and praise. Being above or below average is usually due to random variation, measurement error or luck. A more scientific approach to quality improvement is to see if any program is way above the average. Study what they do and learn best practices. Then share these best practices system wide.



### ***Step 4.0 Improving Our Organization***

#### **Improving our Organization**

To make improvements based upon customer data, a simple project management worksheet is recommended that covers:

- **What** do we want to improve?
- **Why** do we want to improve it?
- **Who** will make the improvement?
- **When** will the improvement be made?
- **Where** will the improvement be made?
- **How** will the improvement be made?

For example, in our employer satisfaction survey the Chief of Nursing commented, “We need ‘a sitter’ for mentally ill people who are recovering from surgery.” This was a key comment we wrote on our Voice of the Customer Table. The project management worksheet can then be used as follows:

<b>Project Management Worksheet</b>	
What:	Job placement opportunity for a “sitter” in the recovery room.
Why:	This could be a community service job that could lead to unsubsidized employment.
Who:	Send our job developer to three hospitals.
When:	Let’s do this month.
Where:	Visit only the hospitals in our jurisdiction.
How:	Job developer conducts interviews. If we find an interest, then talk to the community college healthcare trainer. Determine possible host agencies. Determine possible private agencies for unsubsidized placement opportunities. Make go, no-go decision.

Many fine tools for improvement exist in the *Service by Design Guidebook*. This is available from the Workforce Excellence Network at [www.workforce-excellence.net](http://www.workforce-excellence.net)

Keep in mind that customers may have limited knowledge and experience compared to the knowledge and experience of SCSEP staff. Often the customer does not know what he or she wants. Customers never asked for the electric light bulb, the Xerox machine or the Internet. Some of the greatest innovations come from the subject matter experts. So be creative and keep an open mind to your own ideas and the ideas of others working with the SCEP program.