

THE CUSTOMER ALREADY TOLD YOU · CHAPTER SIX

The First Ninety Days

Five practices set in order, from listening at the front door to measuring the calls that stop coming.

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Chapter Six of The Customer Already Told You. The whole book, with every chapter, is at business.hautelumiere.life/library/the-customer-already-told-you (DOI https://doi.org/10.5281/zenodo.23989055).

A NOTE BEFORE YOU READ

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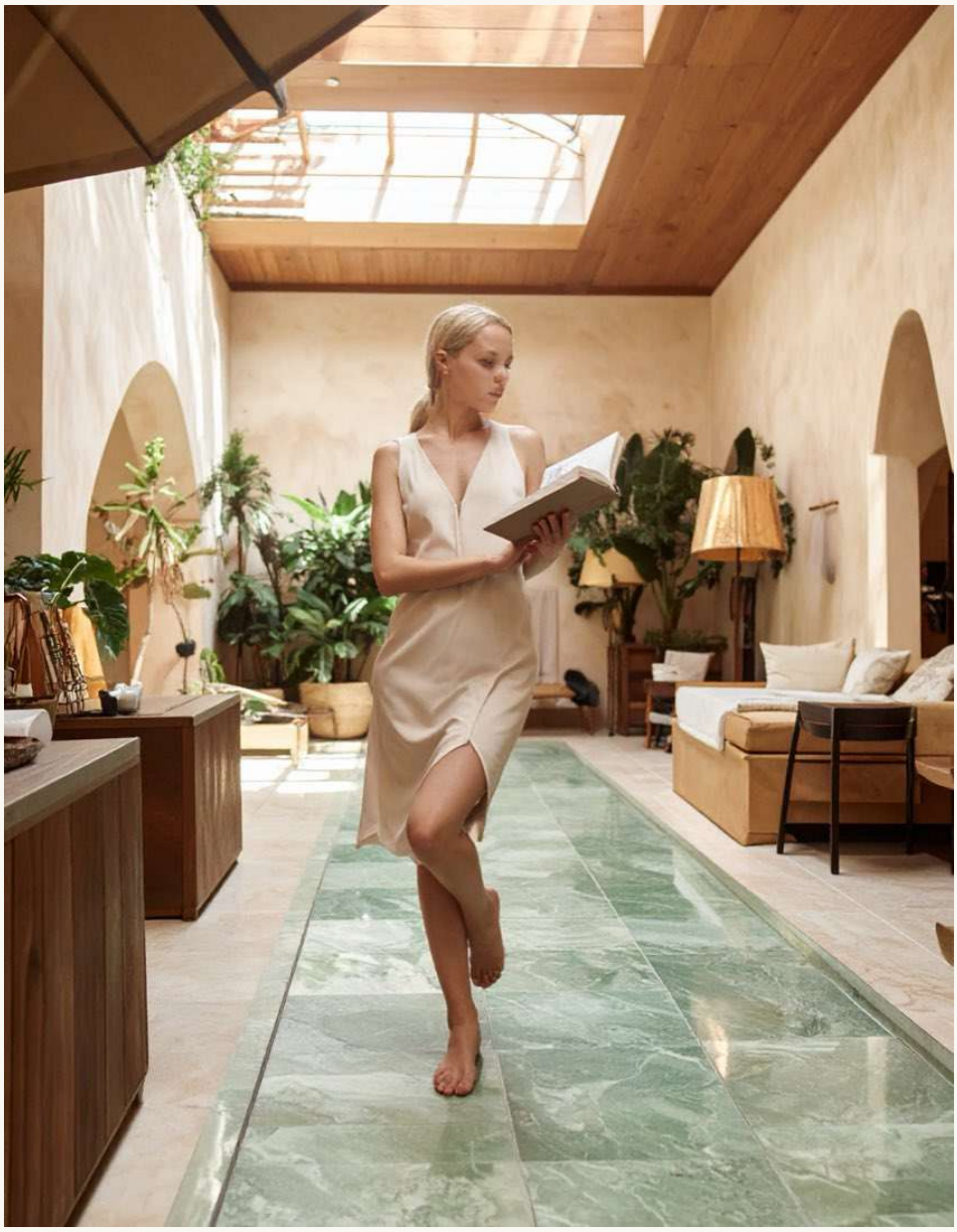
ABSTRACT

Five practices set in order, from listening at the front door to measuring the calls that stop coming. It is half past seven on a Monday, and the chief executive of a service organisation of some five hundred people has the board's customer report open on the desk beside her coffee. It is a good report, as these reports go. Satisfaction is steady. Calls are answered quickly. Complaints are down a little on last year. She has read the first five chapters of a book like this one, or lived them, and she no longer believes that any of those three sentences means what it seems to. The temptation, which she feels as a restlessness in her hands, is to commission a programme by Friday: a name, a consultant, a customer platform, a launch.

CHAPTER SIX

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The First Ninety Days

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Monday, day one

It is half past seven on a Monday, and the chief executive of a service organisation of some five hundred people has the board's customer report open on the desk beside her coffee. It is a good report, as these reports go. Satisfaction is steady. Calls are answered quickly. Complaints are down a little on last year. She has read the first five chapters of a book like this one, or lived them, and she no longer believes that any of those three sentences means what it seems to. The temptation, which she feels as a restlessness in her hands, is to commission a programme by Friday: a name, a consultant, a customer platform, a launch.

She is a composite, drawn from the way these first weeks are described in the research the earlier chapters read and in the house's own practice, and no organisation is meant. Her organisation could be a housing association, an insurer, a utility, a large practice, a chain of shops: anything that serves people who can ring it, write to it, walk into it, or quietly stop using it. This chapter is written to her, and to anyone in her position: the person who runs something and wants to begin. It describes the first ninety days in order, with who is in the room, what each step needs, roughly how long it takes, the decisions that change the result, the mistakes made at each step and how to see them early, how to read what comes back, and what to do on the first Monday. The working pages it refers to are gathered in Chapter 7.

Two things should be said before the plan. The first is that nothing in it requires new software, a survey or a name. Every practice in this book reads what customers already say, in records the organisation already keeps, and a programme with a launch tends to produce a performance of listening rather than the thing itself. The second is that the order matters more than any single step. The chapters were written in the order a reader meets the problem. The ninety days run in the order the practices depend on each other.

Why this order

The five practices in this book are listening at the front door (Chapter 1), following cases home (Chapter 2), hearing the customers who leave (Chapter 3), the second half of every recovery (Chapter 4) and the measurement conversation (Chapter 5). In the first ninety days they run in that order, with one move brought forward.

The reasoning is this. Every later practice depends on knowing what customers actually say, in their own words, and on the people who lead the organisation having heard it themselves. So the first practice is the listening, because it gives the sponsor and her managers the ear that the case traces, the calls to leavers and the cause reviews all need. The case traces come next, because they show how the failures heard at the front door travel through the organisation, and because their first changes, at the point of contact, are cheap and visible. The calls to leavers come third, because a senior person who has already listened at the front door asks a lapsed customer better questions. The recovery cards come fourth, because by then there are owners upstream who have heard their own causes and are ready to read cards about them. And the measurement conversation comes last, because it measures what the other four have changed.

The one move brought forward is the history. Before day eleven, before any practice has altered anything, finance and the convenor copy and date two to three years of every record that bears on what customers say: contacts by channel, completed jobs and the visits each took, complaints, cancellations or lapsed accounts, and any record of problems found by staff that customers never reported. Chapter 5 explains why. A measure of what stopped can only be read against a history fixed before the stopping began.

Santa Anna's canon, describing the first rule of a practice in which an organisation gathers what its people are noticing, gives the discipline of the first month in one sentence:[30] "No solutions. The temptation to jump from observation to recommendation is suspended." The first ten days are spent finding out.

Who is in the room

Three roles carry the first ninety days, and they should be named before anything else is done.

The sponsor is the most senior person whose organisation's customers the practices will touch. In a small organisation it is the chief executive. In a large one it may be the head of a division or a region. The sponsor's job is not to manage the work. It is to listen herself, to make the calls to leavers that only a senior voice can make, to sit in the cause review often enough that owners attend it, and to protect the people who report what customers say. Expect it to take four to six hours a week in the first month and three to four after that.

The working group is small: five to seven people. It should include two people from the front line who hear customers every day, an adviser and, where the work involves visits, an operative or engineer; someone from finance who will later lead the measurement conversation; the owner of at least one upstream system that customers' failures come from, such as scheduling, billing or booking; and, where the organisation has a way to find one, someone who speaks for customers, such as a member of a tenant panel or a long-standing client. It helps to include one person who joined recently, because newcomers still hear what everyone else has stopped hearing. The group meets for an hour a week.

The convenor keeps the record: the demand sheets and tallies, the case traces, the notes of every call to a leaver, the recovery cards and what happened to each cause, and the dated copy of the history. Often this is someone from operations or from the contact centre's own planning team. The convenor needs about two hours a week, and three in the weeks of the case traces. The quality that matters most is that the front line trusts the convenor to write down what customers said rather than what the organisation would prefer them to have said.

One decision changes the result more than any other at this stage. The sponsor must decide that she will listen herself, at the front door, at least twice in the first month, and read at least three case traces end to end. A sponsor who receives the listening as a summary receives what the canon's healthcare case calls the executive summary, in which what the front line knew has been reframed on its way up until it recommends more training. Santa Anna's canon gives the consultant in that case the question every sponsor should ask herself before delegating the ear: "What is the cost of not trusting the intelligence that lives closest to the problem?"

Days one to ten: listening before changing

The first ten days change nothing visible. They gather four inputs, and the sponsor does part of the gathering herself.

The first is a list of every route by which customers reach the organisation, and who reads each. Telephone, email, web forms, chat, letters, the counter or reception, the doorstep, social media, the complaints that arrive through a regulator or an ombudsman. For each, the convenor writes down roughly how much arrives in a week, where it goes, and who, if anyone, reads it for patterns rather than for handling. Most organisations find at least one route that nobody reads.

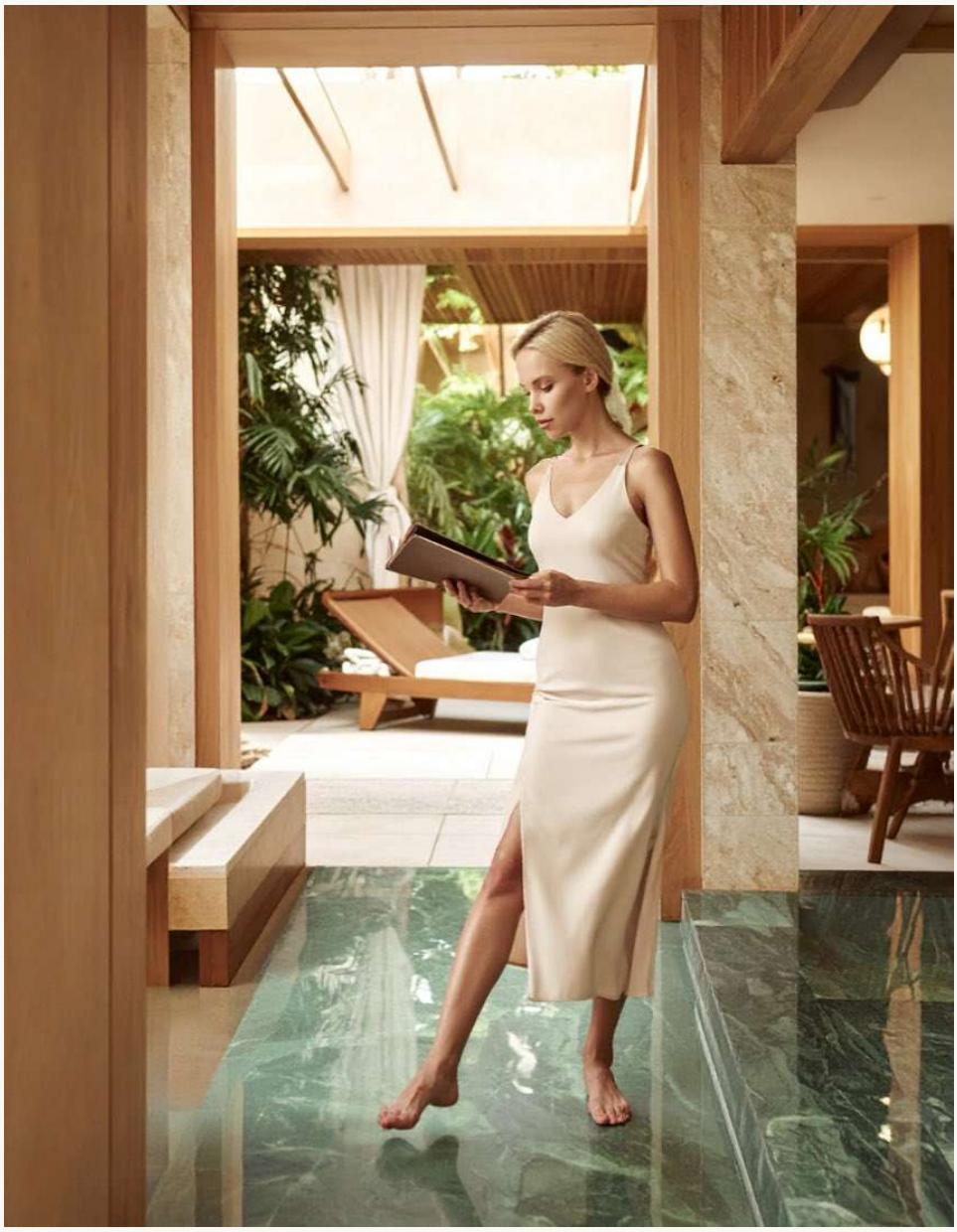
The second is the set of reports about customers that reach the sponsor and the board, and what each counts. Answered within target, resolved at first contact, satisfaction score, complaints received, net promoter, whatever the organisation reports. For each the convenor notes, in a sentence, what unit it counts (a contact, a case, a survey response, a customer) and from whose side it is measured. This is not yet a criticism of the reports. It is a map of what the organisation can and cannot see.

The third is two sessions at the front door for the sponsor, of a morning each, with a spare headset or a chair beside the counter, and with nothing written down except what customers said. These are not yet the formal listening of days eleven to thirty. They are for the sponsor's own ear, so that when the sheets come back she has a sound to set them against.

The fourth is the inventory and dated copy of the history, described above, finished and filed unaltered before day eleven.

At the end of the ten days the working group meets for the first time and writes, on a single page, its first guess at where the organisation stops hearing its customers: two or three kinds of contact that seem to come round again, one or two routes that nobody reads, one or two groups of customers whose orders, bookings or contacts have fallen without explanation. It is a guess and should be labelled one. The page is kept and revisited on day ninety.

What goes wrong at this stage. The commonest mistake is to announce. A sponsor who tells the organisation that it is launching a customer programme will find that the front door becomes a performance of good service whenever she is near it. The early sign is a question in a corridor: *what is the new customer thing called?* If people are asking what it is called, it has been named, and the sponsor should stop naming it. The second mistake is to begin with a survey. A survey of customers in week one produces a score from the customers who answer surveys, which is the self-selected group Chapter 2 described. The third mistake is to buy something. A platform bought in the first ten days decides what the organisation will listen for before anyone has listened.



Days eleven to thirty: listening at the front door

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Days eleven to thirty: listening at the front door

In the third week the listening of Chapter 1 begins. The sponsor and two or three managers, ideally including the head of the contact centre and one manager from an upstream service, listen at every route customers use, on two mornings and one afternoon a week, for a fortnight. Each listener fills in the demand sheet in Chapter 7: what the customer wanted, in the customer's own words; value demand or failure demand, judged from the customer's side; and, for failure, its kind and where it was made.

The listening takes about three hours a session. At the end of each session the listeners spend twenty minutes together on the calls they marked *not sure*, and agree how to sort them. At the end of the fortnight the convenor tallies the sheets by where the failures were made, and the working group reads the tally for an hour.

The decision that changes the result is what is done with the tally. It is taken upstream, to the owners of the systems the failures came from, with the sheets, and each owner is asked to listen to ten of the calls their system produces. It is not turned into a target, a league table or a figure on the wall. The front line watches what happens to the first tally more closely than anything else in the ninety days, because it tells them whether the listening was a study or an audit.

What goes wrong. Listeners classify from inside: *the customer should have read the letter*. Only the phone is heard, and the letters and the doorstep are left out. An adviser's handling of a call is discussed by name, and the next session's calls become careful. The tally is presented to the board as a percentage, and the conversation becomes about whether the percentage is right. The early sign of each is the same: the advisers stop telling the listeners things that are not on the sheet. When that happens, the sponsor should ask one adviser she trusts, privately, what changed.

How to read what comes back. By day thirty the tally should show a handful of causes that account for most of the failure demand heard, and at least one owner should have listened to ten calls and changed something small: a sentence in a letter, a text the evening before, a field on a job sheet. Those first changes matter more than their size. They are how the front line learns that what it hears can travel.

Days twenty-one to forty-five: following cases home

Overlapping with the end of the listening, the convenor draws ten customers at random from an ordinary month and gathers every contact each made about the same matter, by every route, as Chapter 2 describes. The sponsor reads at least three of the ten end to end with an adviser beside her; managers from the working group read the rest in pairs, each pair with an adviser.

For each case the readers fill in the case trace in Chapter 7: the customer's first sentence, the contacts in order, the days elapsed, the contacts that were chasing or explaining again, and, at each contact, what the person handling it would have needed to finish it there. The convenor counts the answers by group, and the clean cases, the ones done in a single contact by the customer's definition.

Gathering the first case usually takes a morning, because the routes through the systems have to be found; the tenth takes under an hour. Reading a case with an adviser takes thirty to forty minutes. The working group spends ninety minutes on the ten together.

The decisions that change the result are about the point of contact. The first change should put in front of the person who speaks to the customer the one piece of information that would have finished most cases,

and give that person the authority to act on it within a written limit. These changes are cheap, they are visible to the front line within weeks, and they move the finishing of cases to the people who already know how. Larger changes, to systems or to the boundaries between teams, are named and given to owners, but they are not allowed to delay the first.

What goes wrong. The ten are chosen rather than drawn, and they are the worst ten. Only calls are gathered, because calls are easiest to find. The readers ask the adviser why a case was closed instead of what she would have needed. A target for contacts per case is set before anyone knows what moves it. The early signs are in the traces themselves: if every case reads as an exception, they were not drawn at random; if no trace contains a letter, the gathering is incomplete.

How to read what comes back. The traces produce three things worth keeping: the clean-case count, which should be read beside the organisation's own first-contact figure and the gap between them noted without drama; the groups of answers, which show where the first change belongs; and the list of systems that had to be searched to see each case whole, which is the list an adviser would need to see it too. Trace another ten in four weeks, and expect the largest group to have moved.

Days thirty-one to sixty: the ones who leave

In the fifth week the convenor produces, from the organisation's own records, a list of customers whose pattern has changed: accounts that ordered regularly and have stopped, subscribers who have stopped using the service, clients whose business has shrunk, whatever lapse looks like in this organisation. The sponsor, and one or two senior colleagues if the list is long, ring between ten and twenty of them over four weeks.

Each call follows the run sheet in Chapter 7. It opens with what was noticed and an apology for not noticing sooner, asks one question, and waits. It contains no offer. Santa Anna's book on doing business as a living system describes the spirit of such a call in its account of a weekly call to customers made for no purpose except to ask how they are: "Not a sales call. Not a feedback call." The call to a leaver has a purpose, but it should sound like that. The caller writes down what is said in the customer's own words and, at the end, says what she will look into and when she will ring back. Then she rings back.

At the same time the counter page of Chapter 3 is started at one or two places where customers speak to the organisation face to face or by phone: a sheet of sentences, in the customer's words, of anything that sounds like *this didn't work for us*. The sponsor or the owner of that part of the business reads it every Friday, and every line receives an answer within a week: changed, and how; not changed, and why; or passed to someone named, on a date.

Every complaint received in these weeks is also read as a sample, as Chapter 3 describes: for each, the convenor asks the records who else has met the same thing and not said so, and notes the answer beside the complaint.

The decision that changes the result is the second call. A customer who is rung, tells the truth, and hears nothing further has learned that speaking is pointless, and so has everyone she tells. The sponsor should not make more first calls than she can follow with a second.

What goes wrong. The calls are delegated to a junior member of staff with a script, and become a survey. An offer is made, and leaving becomes a negotiation. Only the largest accounts are rung. The counter page becomes a complaints form with categories, and the sentences stop. The early signs: lapsed customers who are rung decline to talk, which usually means the opening sounded like a sales call; the counter page has fewer sentences each week, which usually means the last week's were not answered.

How to read what comes back. By day sixty the notes of the calls and the counter page should show a few causes, some of which the listening at the front door has already heard and some of which it has not, because customers who leave are often the ones who never rang. Put the two lists side by side. A cause that appears on both is a cause worth a great deal.

Days forty-one to seventy: the second half of every recovery

Overlapping with the calls, the organisation builds the second half of its recoveries, as Chapter 4 describes. The first step is to write down the authority the front line has to put things right without asking, and the limit, and to make sure every person who faces customers knows it. The second is the recovery card: six lines, filled in for every recovery however small, with the cause in the words of the person who did the recovering. The third is the follow-up call, within two days, by someone other than the person who recovered, to ask whether what was done was enough.

The fourth is the weekly cause review. The convenor groups the week's cards by cause, and each group goes to the owner of the system or rule that produced it, who is asked for one thing within a week: a change, or a plain reason why the cause will stay and what it will cost to keep. The review takes thirty to forty-five minutes. The sponsor attends the first four and every fourth after that.

Santa Anna's canon, in its guidance on how an organisation names difficult truths about itself, gives the rule that keeps the review alive: "Effective acknowledgment names systemic patterns that individuals participate in but that no single individual controls". The cards describe rules and systems. The review asks what each produced, not who made it.

The decision that changes the result is who reads the cards. If they are read only by the front-line team, the organisation will become very good at recovering from the same failures. If they are read by the owners of the causes, it will start to have fewer of them.

What goes wrong. The authority is written so narrowly that nobody uses it. The cards acquire categories and drop the sentence about why. The cause review becomes a hunt for whoever made the rule, and owners stop attending. The recovery budget is cut because it has risen, when it has risen because customers can now speak. The early sign of each is on the cards themselves: if the *why* line grows shorter each week, people have stopped believing anyone reads it.

How to read what comes back. By day seventy the cause review should have changed at least one rule or system, and the convenor's record should show, for each cause, the number of cards before and after. Read those numbers with care: the change has been in place for weeks, not months. They are the first input to the last step.



Days sixty-one to ninety: measuring what stopped

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Days sixty-one to ninety: measuring what stopped

In the last month the working group chooses one or two of the changes made, the ones whose effect is most likely to show in records the organisation already keeps, and holds the measurement conversation of Chapter 5. Finance leads it. The operations members, the front-line members, the owner of the upstream system, the customer voice and whoever will calculate and check are in the room. The sponsor attends and says little.

The conversation follows the order in Chapter 7: what has been changed, in plain words; what unit follows the case rather than the channel; what the dated history shows about that unit's ordinary range and its seasons; what moves the unit for reasons nobody controls, and from which outside record each adjustment will be taken; which signal of customers who have stopped asking will sit beside the measure; how any labels will be checked blind; who calculates, and who checks; how the result will be shown to the people whose work produced it; and what will change, in the organisation's own records, if the gain is real. The output is one page, signed by the people in the room. The first conversation usually takes two meetings of ninety minutes.

By day ninety the first monthly figure should be on a wall where the front line can see it, plotted against the ordinary range of its history, with the balancing measure beside it, in the same form the board sees.

Santa Anna's canon describes what such a page is for, in its account of an organisation that hears well: "Every person in the organization becomes a sensor". The page on the wall is how the front line, which has been the organisation's best sensor all along, sees what its reports became.

The decision that changes the result is timing, and most of it was taken before day eleven, when the history was fixed. If a team had already begun to change its work before the history was copied, agree the measurement for that change from now. The earlier improvement is not counted. That is a real cost, and a small one beside a number nobody believes.

What goes wrong. Raw contact counts are used, and a mild season is mistaken for a gain. A web form is launched and the phone figures fall, and the shift is mistaken for a reduction. The balancing measure is left out because it is held by another team. An adjustment is proposed after the results are in. The early sign of each is the same: someone in the room, often the front-line member or the customer voice, goes quiet. The sponsor's job at this step is to notice who has stopped speaking.

What this step does not settle is how a measured gain is then shared with the people who found it: the proportions, the timing, the thresholds and the terms. Those depend on the organisation, its people and its history. They are decided with the people who will be covered, and for an organisation working with Luminous Prosperity they are the substance of the engagement, not of a book. What the first ninety days can do is make that later decision honest, by producing a gain that both sides already believe.

Day ninety: reading what you have

The working group meets on day ninety with six things on the table: the first-guess page from day ten, the demand tallies and the owners' first changes, the case traces with their clean-case count, the notes of the calls to leavers and the counter page, the recovery cards and the cause review's record, and the signed measurement page with its first figure.

It asks a short list of questions, in order. Where was the first guess right, and where was it wrong? Which failures heard at the front door have been removed upstream, and who removed them? How many of the ten cases were clean, and has the second set of ten moved? What did the customers who left say that nobody at the front door had heard? Which causes on the recovery cards have changed, and which owners have not yet answered? Is there a gain both sides believe, and what does it show so far? And then the question that matters most for the next ninety days: which customers, and which members of staff, have started saying things they did not say before?

What not to conclude is as important. Ninety days are too short to say that customers are better served in any lasting way; they are long enough to say whether the practices are being kept. A single month's fall in contacts is not yet a gain, for the reasons Chapter 5 gave. And an absence of findings is itself a finding. It usually means that one of the earlier practices is not yet real, and the first place to look is the front door: is the sponsor still listening herself?

Santa Anna's book on doing business as a living system gives, in its account of asking customers what they need, a four-word instruction that fits the whole of the ninety days: "Read every response yourself." The practices in this book can be delegated, and in a large organisation much of each must be. The reading cannot.

What to do on Monday

If the whole of this chapter is too much to begin with, three things can be done on the first Monday, and none of them needs anyone's permission.

Sit beside the people who answer your customers for one hour, wherever they answer them, and write down the first sentence of every contact in the customer's own words. Mark each one that begins *I'm ringing again*, or means it.

Take one customer who contacted you last month, and find every contact that customer made about the same matter, by every route. Count them, and count the days.

And find one customer who used to buy from you, or use you, and has stopped, and ring them yourself, with no offer, to ask what went wrong.

Monday, day ninety-one

It is half past seven on a Monday, and the chief executive's diary is full again. Two mornings this month are marked *front door*. On the wall of the contact centre, beside the figure for calls answered quickly, there is a second figure, contacts per completed case, plotted against three years of its own history, with a line beneath it for problems staff found that customers never reported. In the convenor's folder there are ten case

traces from August and ten from September, and the second ten have more clean cases than the first. On her desk is a note from a customer she rang in July, who rang back.

None of these has a name. Nobody has announced anything. The board's customer report is still on the desk, and she has written one question in its margin, the one she will ask on Thursday: *how do we know?*

References

1. Sources for this chapter: The practices and their sources are those of Chapters 1 to 5: Seddon on value demand and failure demand, Gans, Koole and Mandelbaum on contact-centre measurement, Griffin and Hauser on self-selection in satisfaction measures, Hirschman, Best and Andreasen, Singh, and Fornell and Wernerfelt on exit, voice and complaints, the service recovery literature and Kano's categories, and the measurement literature of Chapter 5. Full references are in those chapters' notes; Santa Anna, A. *Conscious Governance Models*, "Principle 3: Distribute the Sensing" (the Sensing Circle) and "Principle 2", the case of the healthcare network. The Luminous Developmental Canon; Santa Anna, A. *Luminous Entrepreneurship: Doing Business In and As Living Systems*, Chapter 8, "Customers as Co-Creators" ("The Customer Co-Creation Toolkit": "The Open Invitation" and "The Thank You Call"). The Luminous Library; Santa Anna, A. *Organizational Soul Work*, "Principle 4: Name the Pattern, Not the Person". The Luminous Developmental Canon; The time estimates in this chapter are planning guides from practice, not findings of a study; adjust them to the organisation.

The First Ninety Days

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