

Creating a Customer Service Team

By Wes Trochlil

In today's competitive business climate, all associations should be setting and prioritizing a "quality customer service" goal to keep members satisfied. After all, our members are our customers, and they keep us in business.

The "business" of the Food and Drug Law Institute, Washington, D.C., includes more than 30 seminars a year and a broad list of publications and audio and video resources for members. More than 5,000 persons from nearly 500 organizations participate in FDLI's seminars or buy publications each year. With this many customer requests, there is always a chance for mistakes or errors. In November 1995, staff at the Food and Drug Law Institute, Washington, D.C., reported a significant increase in the number of complaint calls from members. Soon thereafter, FDLI took a hard look at its fulfillment processes, and decided to create a customer service team.

Identifying the Greatest Challenges

From the start, we were working with one big advantage. FDLI had recently installed a fully integrated database that can handle all seminar registrations, publication orders and fulfillment, and membership records. It also transfers data directly to the accounting department's software, thus allowing for easy communication between the customer service team and the accounting department.

The first step in creating the new customer service team was to identify the areas facing the greatest challenges. For seminars, FDLI was using one person to enter names for registration, create registration lists, run name badges, and handle on-site registration. With 30 meetings a year and an average attendance of more than 100 per meeting, heavy registration periods tended to overlap

each other.

Publication fulfillment was set up the same way: One person handled order entry and fulfillment for more than 4,000 orders per year—a daunting task. In the FDLI's membership department, two staffers were handling new memberships, renewals, and day-to-day database management. These two staffers managed more than 7,000 member contacts and maintained a database of more than 15,000 names.

An Effective Solution

To address all of these concerns, FDLI cross-trained those four staffers to handle each area of customer contact: membership, seminar registration, and publication fulfillment. Because the new, fully integrated system's procedures were similar among different modules in the database, it was easier to train staffers to handle new areas. Once they completed training, we were on our way to begin handling customer service as a team.

Cross-training also created a positive side effect: the elimination of a "single point of failure." With four or more staff capable of handling all types of customer service, FDLI is assured that the team can perform all functions even when a team member is

out of the office. This has also led to a reduction in stress on the staff.

Streamlining Process Flows

Step three of this program was to determine the best way to handle incoming money for publications, seminars, and membership—from inputting information in the system to reconciling funds through accounting. To do this, we held a meeting for the customer service team, all the members of the accounting department, and the information systems manager.

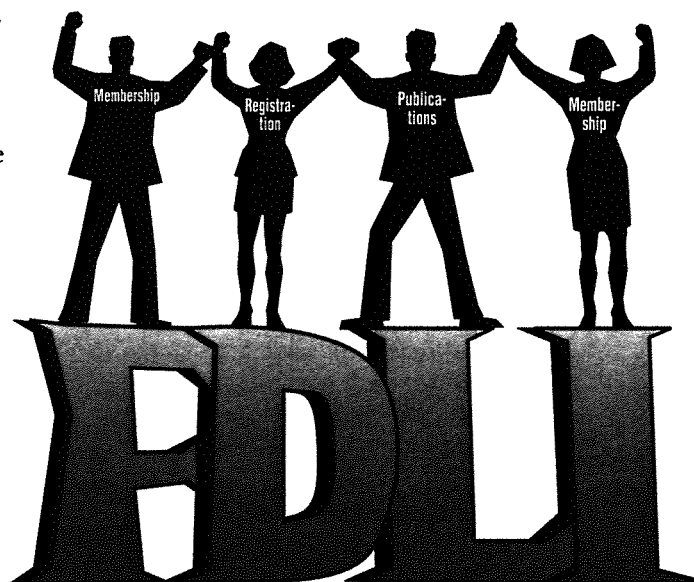
We carefully worked through every step for processing an order, a registration, or a new member (from the initial contact to the moment a product was shipped, a registration confirmed, or a member acknowledged). This may have been the most important step in the whole process.

By including everyone who was directly affected by the actions of the customer service team, we were able to locate and resolve "bottlenecks" in the current processes. For example, one "bottleneck" involved orders, registrations, and membership renewals. These items were often mixed into one "batch." To handle each item, the customer service representative would have to move from one module to another in the middle of a batch.

While this was not an overwhelming problem, it slowed the process and increased the likelihood of user error. So it was decided to assemble batches by group (e.g., orders, registrations, and membership renewals).

The new customer service team also allowed FDLI to address several other problems and challenges such as long turn-around on order fulfillments, delays in meeting registration confirmations, and high levels of staff stress at peak periods during the year. For example, during heavily

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attended meetings or when our annual *FDA Directory* is released, all four team staffers can work on processing registrations or orders.

Results Speak for Themselves

FDLI's customer service team has been a great success. We set an ambitious goal to process all batches within 48 hours from when they were received. (Previous processing times

ranged between four days and two weeks.) We currently process more than 90 percent of our batches within 48 hours, and more than one third of our orders and registrations are entered into our database on the day of receipt.

Perhaps the most satisfying result is that members are taking notice. Recently, one of the customer service team members took an order over the telephone. The team member told the

customer that the order would be processed and shipped by the end of the week. "Really?" responded the customer. "I was expecting to hear four or six weeks for delivery." Not anymore, thanks to our customer service team.

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Customer Service Trends

What kinds of associations are instituting customer service centers, and how are they using them? Check out the survey results from *Policies & Procedures in Association Management, 1996*, published by ASAE.

I. If you have a centralized customer service center, is it operated as a profit center?

	TOTAL	Type of Membership		Scope			
		Individual	Trade	Int'l.	Nat'l.	State/Reg.	Local
Number of responses	364	206	154	114	71	119	60
Yes	35%	38%	31%	30%	31%	32%	55%
No	65%	62%	69%	70%	69%	68%	45%

II. If you have a centralized customer service center, in which department is it located?

	TOTAL	Type of Membership		Scope			
		Individual	Trade	Int'l.	Nat'l.	State/Reg.	Local
Number of responses	228	127	97	85	55	67	21
Marketing	13%	14%	9%	17%	16%	9%	—
Management/Administration	24%	22%	27%	21%	29%	22%	29%
Member Services	45%	47%	42%	40%	40%	48%	67%
Other	18%	17%	22%	22%	15%	21%	5%

III. If you do not have a centralized customer service center, are you planning to start one in the next two or three years?

	TOTAL	Type of Membership		Scope			
		Individual	Trade	Int'l.	Nat'l.	State/Reg.	Local
Number of Responses	1,004	448	551	260	211	423	109
Yes	15%	16%	14%	21%	14%	12%	14%
No	85%	84%	86%	79%	86%	88%	86%

Note: rounded figures in columns may not total 100 percent.