

THE COMMUNITY READINESS CUSTOMER SERVICE GUIDE
For AIR FORCE SPACE COMMAND
FAMILY SUPPORT CENTERS

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FOREWORD

This Guide is a major part of our plan to help Family Support Center staffs develop and offer consistent services to the customers who desire service at our installations. This work reflects Air Force Space Command's response to Air Force guidance that FSC work/life services should be integrated and offered holistically to members and families. We have always seen ourselves as customer-centered in serving DoD members and their families; the following guidance will help us become even more effective in this vital role of serving and supporting the people who rely on us.

This Guide is not an instruction but a carefully crafted framework to design, implement and assess the services that we render to our customers, whether that occurs in or outside our Family Support Centers. FSC Flight Chiefs will customize this strategy as they examine their own bases, resources and the concerns reflected in their communities. However, the overall design expressed in this Guide should be carried out and lessons learned from local experiences should be shared across the command.

This Customer Service Guide reflects only one part of a comprehensive community readiness strategy. In addition to working actively and collaboratively with our customers, FSC staffs will serve their communities through 1) an integrated unit service strategy, 2) a collaborative interagency strategy, and 3) a community development strategy that will promote informal systems of support for DoD members and their families. Together, these strategies will allow us to more directly affect the readiness and retention of our service members and promote our national security.

We are grateful that the design of this Guide has been a joint effort from the very beginning. Dr. Dennis Orthner and Dr. Gary Bowen have spearheaded and consolidated the work and Air Force Space Command Flight Chiefs and staffs have been engaged in the design work through every stage. We are grateful for the insights from those who took the time to read through the drafts of the Guide and offer recommendations for improvement.

Now it is time to implement the concepts and practices outlined in this Community Readiness Customer Service Guide. Air Force Space Command leadership is behind this approach and will fully support its implementation and success. My staff and I are personally committed to making customer service a success in this Command.

Nancy J. Brewer
Chief, Family Matters
Air Force Space Command

December 15, 2003

ACKNOWLEDGEMENTS

Quality customer service is the hallmark of the Family Support Center. It is from this context that this Guide seeks to define and illustrate the FSC process through which customers can count on being effectively and efficiently served. Its contents reflect the inputs and contributions of many people. Ms. Nancy J. Brewer, Chief, Family Matters, provided the leadership and vision for the Guide—she called for a “user-friendly” guide that would support the continued efforts of FSC staffs in delivering high quality services to their customers. We sincerely appreciate Ms. Brewer’s direction and guidance as we struggled, at times, to capture the sequence and nuances of customer service and to find the balance between “too many” and “too few” details. She also made the project fun and engaging, and she ensured that the Family Support Center Flight Chiefs would have an opportunity to provide input into the guide’s development.

Ms. Brewer’s staff at Air Force Space Command (Tracy Dockum, Betty Schuster, and Senior Master Sergeant (Sel) Bob Frohnapfel) was instrumental in all phases of the Guide’s development. They provided expert consultation in helping to conceptualize the Customer Service Strategy Flow Model, and they greatly influenced the organization and design of the Guide. We greatly appreciate their responsiveness to our many requests, as well as their kindness in always making us feel appreciated and valued as members of the Air Force Space Command team. This is one of the hardest working and most competent staffs in the Air Force.

We are also appreciative of the partnership we enjoy with the AFSPC Family Support Center Flight Chiefs: Patricia (Tricia) Czepiel, Dr. John Foley, Sara (Sally) Galligan, Mark Gumbiner, James (Jim) Headstream, Glenn Simms, Emma Terrell, and Kimberly Yates. The Flight Chiefs provided critical input and advice on every section and subsection of the Guide, and we appreciated their willingness to have staff members from their Family Support Centers provide critical review of an earlier outline of the Guide. We simply could not have completed the job without their expert consultation and assistance. We also appreciate the valuable input from Sheryl McCullen, the Deputy Mission Support Squadron Commander at Patrick Air Force Base, and Chief Master Sergeant Cathy Redmond who joined the Flight Chiefs when we met together in Colorado Springs to review the Guide.

We would also like to acknowledge the leadership and contribution of Ms. Barbara Murray, Chief, Force Sustainment Division, and Ms. Linda Smith, Chief, Office of Family Matters, to this overall effort. Both Ms. Murray and Ms. Smith have fully supported and encouraged the development of this Guide. Both have many years of experience in supporting high quality customer service to all members of the Air Force family, and we appreciate the “broader perspective” that they brought to the table of discussion as we worked on this Guide.

We hope that this Guide is more than a good reading; our desire is that it makes a real difference in the continued efforts of Family Support Center professionals to sustain their tradition of excellence in customer service. We appreciate the small role that we have hopefully played in being part of this tradition.

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GLOSSARY

Advanced Process – One of the tracks in which FSC customers are served; Customers served under this track have a customer service plan developed to address the customer's unique issues and to coordinate an array of services that may be needed

Assessment – A process of collecting information and/or data to make a determination; Assessments are conducted at different points in the customer service process: 1) during screening to identify a customer's issues of concern, 2) after a customer has received services to evaluate whether results have been achieved, 3) after multiple customers have been served to guide FSC planning and service delivery

Brief Specific Service – A type of FSC service; These FSC services are offered on a short-term basis and involve a wide array of activities (e.g., computer support, classes, lending closet, etc.) in five core areas

Community Readiness – An Air Force approach to Family Support Center service delivery that integrates traditional categorical program related services into a more holistic service delivery model with a prevention and community capacity building orientation

Community Readiness Professional – FSC staff member with responsibility for providing customer service and developing customer service plans

Customer Resources – A customer's support system that he/she uses to assist him/her in addressing issues of concern

Customer Service – A function of the FSC in which an FSC staff member works in partnership with customers to address customer issues

Customer Service Plan – A plan developed by a FSC staff and customer that specifies the results to be achieved and the services and activities to be provided by the Family Support Center, and, if applicable, other agencies as well as the actions the customer needs to perform to achieve the desired results

Customer Service Process – A model that describes the series of operational procedures or actions that are to be conducted by the FSC to provide customer support; The model articulates how customers are served at all points in the service delivery cycle (initial contact, screening/intake, service participation, exit, follow-up)

Customer Strengths – A customer's capabilities and competence in being able to address issues of own; capacity for independence

Evaluation – A set of methods and strategies for determining the results and effectiveness of services and activities

Follow-up – Specific actions taken by FSC staff to further assist a customer based on short-term assessment findings

Follow-up Assessment – A set of strategies and methods to collect data some period after a customer has completed services to assess whether the customer's issues have been addressed and customer satisfaction; A type of evaluation

Indicator – A concrete metric that can be used to assess/measure a result

Information and Referral (I&R) – A type of FSC service in which facts/data are provided to the customer on a specific topic/issue or the customer is directed to an agency for further assistance

Monitoring – A process used to determine if customers actually received services as planned and to assess customers' progress; A method of ensuring accountability for FSC, customer and, if applicable, other agencies

Partnership – A collaborative relationship in which FSC professional staff and customer work together in determining how to address a customer's issue (in some cases, the strategy may involve developing a customer service plan); A value of how FSC serves its customers

Result – A change in behavior, knowledge or attitude that is demonstrated by a customer as an outcome of an activity or service the customer has received

Results Management – A decision management and resource allocation strategy to map the path of influence between identified needs, intervention activities and targeted outcomes

Short-term Assessment – A set of strategies and methods to collect data immediately after a customer has completed services to assess whether results have been achieved; A type of evaluation

Simple Process – One of the tracks in which FSC customers are served; Customers served under this track receive I&R or brief specific services immediately following screening

Unit Liaison – FSC staff member with responsibility for providing unit service

Unit Service – A function of the FSC in which an FSC staff member works in partnership with unit leaders to develop strategies to effectively address the concerns of unit personnel and families

Work/Life Issues – Issues pertaining to managing the competing demands of military life and family life

THE CUSTOMER SERVICE GUIDE

Surveys of FSC staffs reveal a strong commitment to quality customer service, and FSC customers rate the FSC as a responsive and supportive agency in large-scale Air Force surveys. These customers not only involve military personnel and family members who are seeking information and assistance with day-to-day living; they also include members of the chain of command and base organizations and groups that work in partnership with FSC staff in assisting personnel and families in maximizing the opportunities and managing the challenges and demands of Air Force life.

This Guide, which is for all FSC staff, provides instruction on customer service provided by Air Force Family Support Centers. The information outlines the procedures and describes the collaboration necessary to serve customers effectively and efficiently. This Guide has three primary objectives:

- Define and describe the process of serving FSC customers
- Provide tips and guidance to help FSC staff implement the customer service function
- Outline critical steps for getting ready to work in accordance with the procedures and processes presented in this Guide.

Several tools are provided in the text and Appendix to help FSC staff perform the screening, service delivery, evaluation and planning tasks involved with serving customers. Please note that this Guide focuses on the process of customer service and does not address how to plan, develop and deliver specific FSC work/life services.

This is one of two Guides that describe how the FSC provides services to FSC customers. This Guide focuses on those customers who seek assistance from the FSC. FSC staff are encouraged to consult [The Community Readiness Unit Service Guide for Air Force Space Command Family Support Centers](#) for guidance on providing FSC services directly to units through unit outreach. The Unit Service Guide provides a flow model for working directly with unit leadership to address personnel and family issues at the unit level. The processes for providing services to people both in and outside of the FSC setting are similar.

This Customer Service Guide focuses on the tasks associated with effective direct service to FSC customers. It is divided into three parts:

- Part 1: Overview of the FSC Customer Service Strategy identifies the goals for customer work/life services and provides foundation principles for these services and community readiness

- Part 2: Providing Customer Service describes five critical tasks that should be included in a successful customer service strategy
- Part 3: Getting Ready to Perform Customer Service Tasks gives counsel on the preparation that FSC Professionals should undertake to assure their readiness to perform the critical tasks expected of FSC personnel.

PART 1: OVERVIEW OF FSC CUSTOMER SERVICE STRATEGY

What are the goals for FSC customer service?

The purpose of the FSC customer service strategy is to comprehensively address concerns and issues of military personnel and families that impact readiness and retention. To do this, the customer service strategy is primarily designed to achieve three primary goals:

- Address work/life issues faced by FSC customers as individuals, members of families or as organizations
- Provide all FSC customers with a comprehensive and well-coordinated services strategy
- Ensure accountability for achieving customer results.

What are the principles for FSC customer service?

The Air Force Family Support Center (FSC) is committed to assisting commanders, military personnel and their families, and DoD civilian employees in managing the competing demands of the military mission and family (i.e., the FSC mission) and enhancing community readiness. The FSC assists its customers through a wide range of short-term work/life services. The FSC adheres to the following customer service principles, which are associated with quality professional customer service:

- All FSC staff can provide basic FSC work/life services to customers.
- All customers are screened to identify the customer's specific requests or concerns, including a more complete assessment for customers with complex challenges.
- Goals are established with and for each customer to align services with the customer's presenting requests or concerns.
- Every customer with complex issues has a "plan" that details a "course of action" designed to address the specific needs and concerns of the customer.
- The customer plans are monitored to ensure the accountability of the FSC and customer in making progress towards achieving the customer's goals.
- All services provided by the FSC are evaluated and customer feedback obtained to determine the effectiveness of FSC services and response.

- Every effort is made to provide timely and accurate information and service so that the FSC is responsive to its customers.
- The FSC places great emphasis on staff collaboration and close working relationships with other agencies to achieve a smooth customer service process.

Further, the FSC maintains the following values that also reflect how it serves customers:

- Establishes a partnership relationship by involving the customer in the planning, implementation and evaluation of services
- Provides a supportive environment but works from a framework that recognizes customer strengths and capacity for independence
- Helps the customer develop competence and confidence in resolving their issues of concern
- Helps customers avoid getting into “crisis situations.”

Who is responsible for providing customer service?

The Community Readiness professional staff assumes basic responsibility for customer service. Other FSC staff may perform designated customer service tasks as determined and directed by the FSC Flight Chief.

What is the role of the FSC staff in customer service?

The customer service function of the FSC involves five tasks:

- Task 1: Screen customer issues and requirements
- Task 2: Develop customer service plans
- Task 3: Provide FSC services:
 - Basic information and referral
 - Brief specific services and monitoring
 - Customer service plan services and monitoring
- Task 4: Evaluate results of FSC services
- Task 5: Reassess FSC services and customer support.

FSC staff can expect to be involved in all or most of these tasks. The level of involvement by individual staff in each of the five tasks is expected to vary and will be determined by the FSC Flight Chief. Similarly, any staff member who provides a brief specific service (e.g., class or counseling or computer assistance) will also be expected to evaluate this service and provide follow-up. Some staff may be assigned to perform the initial screening whereas other staff may be given responsibilities for conducting in-depth assessments of customer issues. For these tasks to be performed by the FSC, FSC staff will be required to work in a variety of capacities and play a number of roles, including one or more of the following depending upon the responsibilities assigned:

- Multi-functional member of FSC staff
- Professional skilled on work/life issues and community services
- Advisor to and advocate for personnel and families
- Assessor to identify the stated and unstated issues and concerns of customers
- Team player in planning and delivering FSC services
- Coordinator to arrange delivery of FSC services outside of the FSC, to manage referrals to individual FSC staff with specialized skills, and to follow-up on referrals to base and community agencies
- Monitor to ensure customers receive services and to measure customers' progress
- Evaluator to assess effectiveness of services and to reshape services as needed.

What are the intended results of effective customer service?

The customer service strategy is designed to achieve results in three areas.

Military and DoD Civilian personnel and families. By providing customers with information and tailored comprehensive and coordinated services, military and DoD civilian personnel and families will demonstrate the following knowledge, attitudes and skills:

- Skills and competencies in managing and coping with the demands of military life and family life
- The capacity to solve personal and family issues before they become crises
- Knowledge about resources available to assist them and where they are located

- Value and know how to effectively use FSC staff and resources
- Higher levels of personal and relational competence and greater satisfaction with the military and its lifestyle
- Greater connection to Air Force support services and community support through on- and off-base organizations and relationships
- Higher levels of military readiness and retention.

FSC. By providing an array of services tailored to customer work/life and readiness issues and monitoring the effectiveness of these services, the FSC will achieve the following results:

- Have a multi-skilled cadre of FSC staff to help ensure the most effective utilization of FSC resources
- Tailor services to customer requests and concerns
- Address individual and family issues more holistically (i.e., services can be designed and coordinated to address multiple issues/problems rather than focus on one problem area)
- Have greater knowledge of work/life issues and understanding of how available services and resources are capable of addressing work/life needs of their customers
- Become a results-based family support system.

Community. By the FSC working with others in the process of addressing individual and family issues, the installation will experience a number of positive results:

- Achieve better coordination of on- and off-base services
- Maximize the operation of formal and informal community social networks
- Demonstrate increased capacity to prevent and/or resolve personal and family issues before they become crises
- Improve base-level readiness for deployments and other contingencies and increase the retention of military personnel.

Part 2 of this Guide describes and highlights key elements of the customer service function of the FSC.

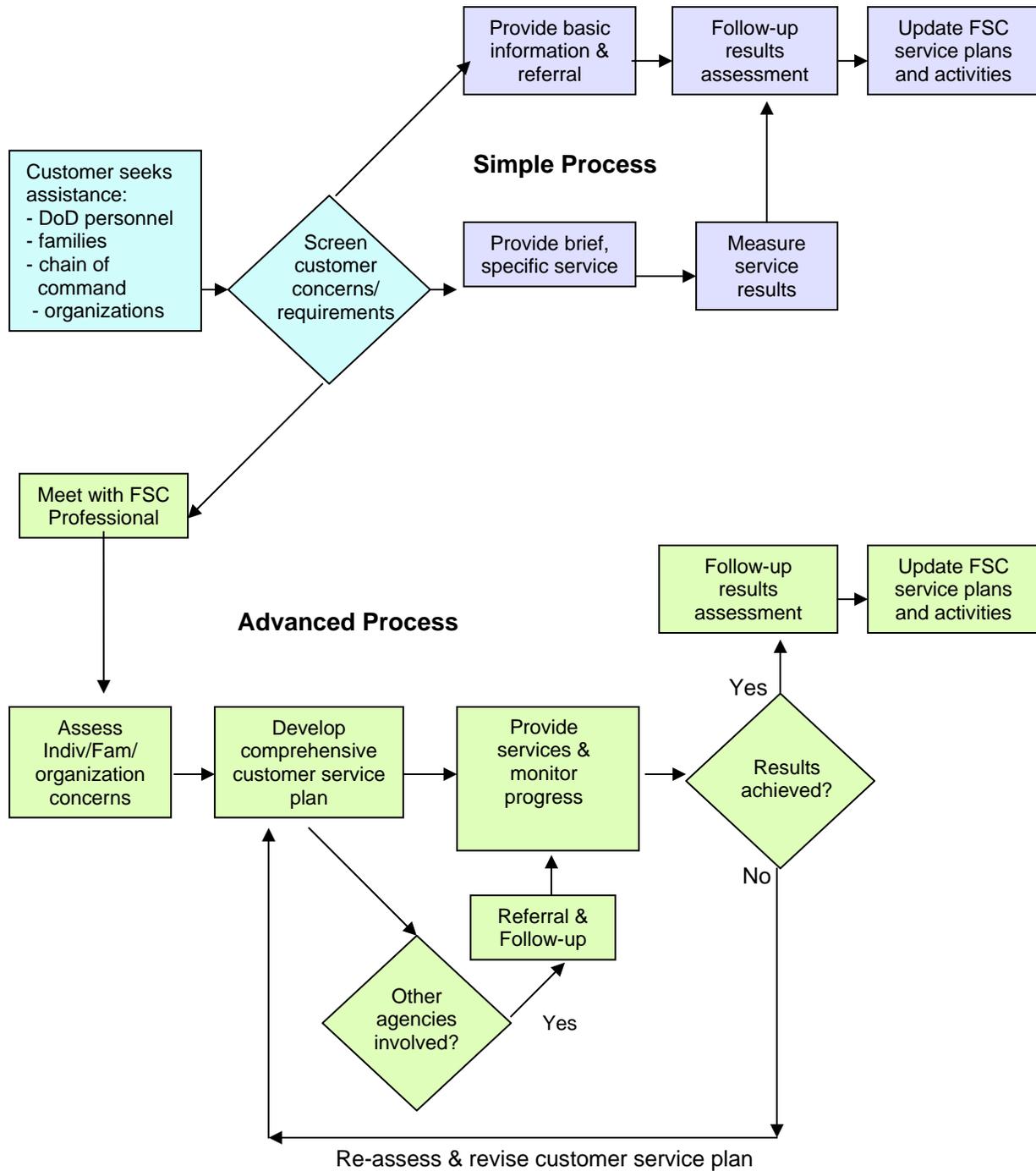
PART 2: PROVIDING CUSTOMER SERVICE

This section of the Guide describes the five tasks of the customer service process and provides guidance on their implementation. FSC staff are required to perform one or more of the following customer service tasks:

- Task 1: Screen customer concerns and determine customer requirements
- Task 2: Develop customer service plans
- Task 3: Provide FSC services:
 - Basic information and referral
 - Brief specific services and monitoring
 - Customer service plan services and monitoring
- Task 4: Evaluate results of FSC services
- Task 5: Reassess FSC services and customer support.

A graphic flow model depicting the tasks the FSC performs to address customer issues and concerns is provided on the next page. The Customer Service Strategy Flow Model depicts two potential tracks by which customers are served, depending on their specific needs and issues. One track reflects a “Simple Process” whereby requests and issues are addressed by providing information and referral or by providing a specific service. The second track, “Advanced Process,” occurs when a variety of issues need to be addressed and the service strategy requires different types of services or specialized assistance to meet a customer’s needs. The model shows the tasks that FSC staff will perform when working directly with customers under these two tracks (i.e., customer service process). In addition, the model illustrates the tasks for planning, assessing, delivering, and evaluating services to ensure the FSC is effectively addressing work/life issues (i.e., fulfilling the FSC mission).

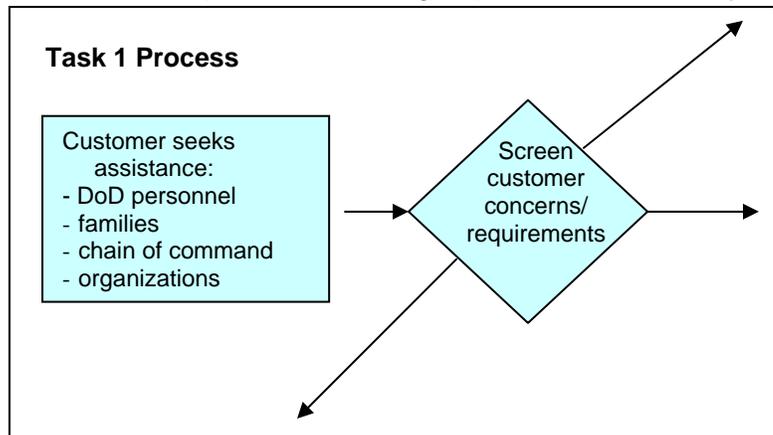
AFSPC Customer Service Strategy Flow Model



Task 1: Screen Customer Concerns and Determine Customer Requirements

Greeting customers with a smile and identifying a customer's concerns and issues are the first steps in providing high quality customer service. By identifying customers' concerns, you can then provide what customers want. This is the intent of screening customer concerns and requirements. In addition, it sends the message that you and your FSC are willing to take the time to find out what customers are seeking to provide a personalized level of service.

The individuals who seek assistance from the FSC represent various groups within the military community including: military members, families, DoD civilians, chain of command, and organizations. These individuals contact the FSC in various ways (such as telephone, e-mail, walk-in, or approaching a FSC staff member when he/she is out in the community). Regardless of the circumstances by which individuals contact the FSC, all customers are to



be screened to identify their concerns and to determine how the FSC can help them. This screening should be conducted at the time the customer contacts the FSC by telephone or as walk-in. If the FSC is contacted via e-mail or in a public location in the community, then the customer should be invited into the Family Support Center or appropriate measures taken to respond to the customer. In the case where the individual contacting the FSC is seeking services on behalf of another individual (e.g., he/she wants to refer someone to the FSC), your FSC may elect to revise screening procedures and establish a different protocol for these contacts.

The screening process involves three steps:

- Step 1. Identify what help the customer is seeking
- Step 2. Determine the level of screening needed and identify all issues of concern
- Step 3. Make a preliminary determination of the type of FSC services that need to be provided.

During the screening process, you will need to complete appropriate forms and enter information into databases/record-keeping maintained by the FSC (which may include Air Force customer tracking tools).

Step 1: Identify what help the customer is seeking. Your first step is to fully understand the customer's request. In this step, the focus is on letting the customer state in his/her own words the concerns, needs and/or assistance he/she is seeking. At this initial point in your contact (and relationship) with the customer, listening and inviting the customer to talk is important. In some instances, the customer may not be able to specifically state what information or service may be needed but rather describes a problem or situation that s/he needs help resolving. Therefore, probe until you have a clear understanding of the customer's issues of concern.

You also need to know how the customer has been dealing with the issue(s). To get this information, you can ask:

- 1) what strategies or resources, if any, the customer has already tried or accessed

and

- 2) whether or not these strategies or resources worked.

Although you may feel at this point that you have a lot of information, it is important not to jump to any conclusions or solutions until you have explored whether other issues need to be addressed. Because the goal is to maximize this opportunity to assist customers, the "screening" does not end with the intake of the request. You need to identify other potential issues that may be relevant to the customer but not on their mind at the time. This determination requires asking a series of follow-up questions to obtain a comprehensive picture of customer concerns and situation. This procedure is described in step 2 of the screening process.

Step 2: Determine the level of screening needed and identify all issues of concern. Having listened to the customer, you now have heard what the customer has told you and are beginning to understand the customer's expressed concerns. Screening provides you an opportunity to obtain a more in-depth picture and understanding of the customer, if they choose to let you question them further. The purpose of the screening is to explore whether there are other potential issues of customer concern. The goal is to determine the education/information and assistance that can be provided to the customer that will help the customer address current and upcoming issues. An important aim is to prevent the customer from having to return within a short period on another matter or in crisis.

TIPS ABOUT YOUR ROLE IN THE CUSTOMER REQUEST AND SCREENING PROCESS

- Invite customer to state issue(s) in his/her own words
- Encourage customer to talk to you
- Listen carefully and give your full attention
- Observe nonverbal communication (e.g., body language, aversion of eyes, discomfort or stress in tone of voice)
- Paraphrase what the customer is saying to show you are listening and understanding
- Gently probe for other related issues that may not be stated

Your expertise and knowledge of personnel and family issues will be critical to being able to screen customers effectively. At least two levels of screening are to be conducted depending upon the nature of customer requests and on-the-spot assessments of the range and depth of customer concerns. This initial screening process, which is comprised of two parts, may be standardized by your FSC (i.e., set protocols determined and used by the FSC) and thus you will be expected to implement your FSC's protocols. An overview of the two levels of screening is provided here.

Bear in mind that when asking these questions, you want to encourage a dialogue with the customer. Obtaining some level of customer interaction is essential to building a partnership relationship with the customer in which you and he/she will identify together what assistance will be viewed as most essential after talking about the questions below (i.e., step 3 of the screening process).

- Level 1 – Is additional screening or assessment needed?

- ✓ Are the customer's issues or concerns specific enough that the appropriate course of action by the FSC is clear? (e.g., want something from loan closet, request a publication, want to use SITES, want to sign up for a class, want to contact a deployed spouse/service member). Is the customer open to further questioning to determine other ways in which the FSC can assist them? If no, provide the service needed (see Task 3). If yes, proceed further in the screening process and begin to gather the information necessary for any required customer tracking tools
- ✓ Does the customer's issue/concern fall within the FSC mission? If no, provide the customer with a referral to the appropriate agency (see Task 3). If yes, proceed further in the screening process and begin to gather the information necessary for any required customer tracking tools.

- Level 2 – Does the customer potentially have other issues?

This screening can be done using any number of methods to include: interviewing, intake form, generic assessment forms, Air Force customer screening and tracking tools and/or specialized forms you may be asked to use. The following types of questions and sequence of questions are recommended to conduct a complete assessment of customer concerns regarding work/life issues. The depth and breadth of this questioning will depend upon customer's responses.

- ✓ Ask questions to obtain a **basic demographic profile and details about military life** (recruitment, deployment, training, relocation, transition) **and family life** to determine what issues you may need to explore further. For example, if the customer is a unit leader, it is important to ask whether the issue applies to one unit member or is a broader problem of unit concern. If the customer is a service member, asking about marital status and children will help begin to identify whether

you will need to explore issues related to family members (e.g., employment of spouse, need for childcare).

- ✓ Ask questions to determine what **other concerns related to the work/life issue** that the customer identified may also need to be addressed. This will involve “tactful assertiveness” to tease out other issues that may be confronting the customer that may not yet have come to the surface. Your FSC may be able to provide you with a standard set of questions to support you in this line of questioning. The purpose is to explore interrelated work/life issues.
- ✓ Ask questions to determine what **other work/life issues may be upcoming for the customer**. The purpose of these questions is to identify any issues the customer may anticipate occurring that they have not yet considered and to determine their level of preparedness. For example, is the customer expecting to relocate or deploy within the next year? Is the customer expecting the birth or adoption of a child? What information or resources does the customer know about now and are they linked to resources that can help them handle these issues?
- ✓ Probe to determine what **other information or support may be helpful** to the customer.

Step 3: Make a preliminary determination of the type of FSC services that need to be provided. Based on the results of the screening, you need to determine immediately which track will best serve the customer. Based on FSC experience, most customers will be served by the “simple process” (see customer flow model) in which the customer will receive:

- 1) Information pertaining to the issue raised,
- 2) Referral to another agency or service that is requested or deemed appropriate to address the customer’s concern, and/or
- 3) An immediate referral to a “brief specific FSC service(s)” that the customer requests or that the FSC knows will benefit the customer.

For other customers, it will be apparent from your questioning that they will benefit from the “advanced process” in which a comprehensive service plan will be developed with the customer to address individualized needs. The objective is to determine what information, education, referrals and tools will help the customer address current issue(s) as well as the information and guidance that may be helpful for issues that may emerge in the foreseeable future. In the latter case, you are helping the customer to plan and prepare for issues by anticipating issues and providing coping tools early so that customers can be empowered and avoid potential crisis. Once you have determined a course of action that might be helpful, you need to review your ideas with the customer.

For customers to be served via the “simple process”. After talking with the customer and formulating a solution to their concerns, you should map out with the customer the issues that need to be addressed from your perspective and your suggestions. Utilize the FSC Customer Service Worksheet described in Task 2, if that is helpful to guide your discussions with a customer. It is important that the suggestion(s) address the specific request made by the customer as well as any other work/life issues that have been uncovered. You also need to consider the customer’s strengths and any personal, family or unit supports that can help them.

When you suggest information, referrals, services (e.g., classes) and other support that might assist the customer, discuss your rationale and give details on what those particular services or materials provide (i.e., content, objectives) as well as credibility of the source (e.g., what an agency does and their experience, experience of class instructors). Relaying this level of detail serves a number of purposes: 1) you share knowledge that helps win the customer’s trust, and 2) you make the information appear relevant and appropriate. Consequently, the customer can make informed decisions and is more likely to take your advice and follow-up on your suggestions.

As suggestions are made, listen to the customer’s reactions and address any questions so that you and the customer can agree on the appropriate course of action. The discussion will also need to include time and location of services available to determine what services are convenient and accessible to the customer. Once there is agreement, you will need to provide the information, referrals and support immediately following your discussions with the customer. (A discussion about the delivery of these services is provided in detail in Task 3.)

After having assisted the customer and determining what subsequent steps need to be taken by the customer and you (or the FSC), you need to consider how to end this initial contact with the customer. In your closing, invite the customer to contact you with any questions or problems. The goal is to end this initial contact in such a manner that the customer seems satisfied with the service he/she received and has the confidence to pursue the actions needed (i.e., to show up for a class, to contact a referral agency, to read a pamphlet).

For customers to be served via the “advanced process”. In some cases, you and/or the customer may determine that an existing service will not meet the customer’s needs, that the nature of the customer’s issue is so complex or unique that specialized knowledge or expertise is needed, or that the customer faces multiple issues that a coordinated response effort is needed. Utilize the the accepted Air Force statistical tracking tools and the FSC Customer Service Worksheet, which is described in greater detail in Task 2 to record the customer’s issues identified during screening. In these situations, the customer is to receive individualized assistance via the assignment of a FSC Community Readiness Professional and development of a customer service plan. The customer needs to be informed that an FSC Community Readiness Professional will be working with him/her to address the issue(s) of concern. The customer should be informed about how you or your FSC colleague will be working with the

customer and discuss a time to get started. In closing, if the customer is to be served by an FSC colleague, you should ask the customer to contact you if he/she is not contacted within a reasonable timeframe.

Task 2: Develop Customer Service Plans

FSC customers who have multiple concerns or a complex or unique problem will receive very personalized level of service through the development of a comprehensive customer service plan. These customers may be identified during the initial screening process. They may also be identified in the process of receiving and using existing FSC services that fail to fully address their needs or to achieve the desired results.

The purpose of this task is for you to develop with the customer (whether DoD personnel, family member, chain of command, or organization) an appropriate and acceptable course of action to address the customer's issues of concern.

TIPS ON PLANNING WITH UNIT LEADERSHIP

When unit leaders are seeking assistance from the FSC **on behalf of their unit members** and families, the planning process is to be conducted by the FSC Unit Liaison assigned to serve the unit. In this instance, the FSC Unit Liaison will develop a **unit service plan** with the unit leadership. This process is described in The Community Readiness Unit Service Guide for Air Force Family Support Centers.

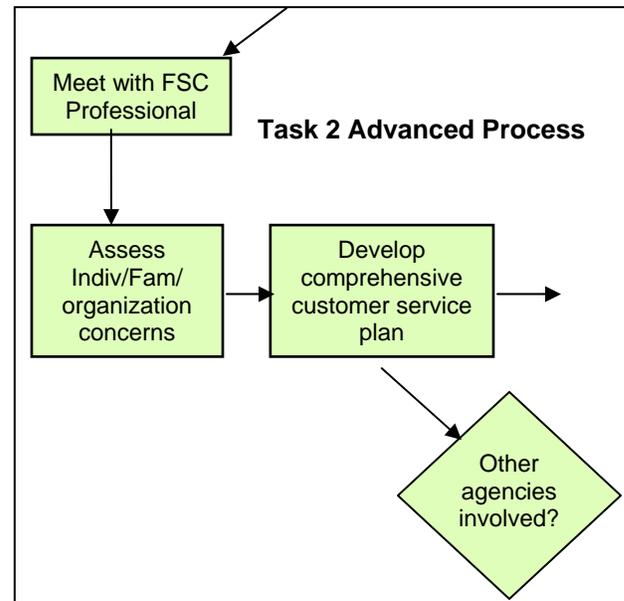
Leaders seeking assistance **on behalf of a leadership group** will be served under the Customer Service function described here. For example, a First Sergeant who requests a briefing for all First Sergeants would be served under the Customer Service function but this would be coordinated through the Unit Liaison. In this instance, a FSC Community Readiness Professional will develop a **customer service plan** with leadership.

In sum, the planning processes are similar; however, the focus of the plans and the group targeted are different.

There are three steps to developing a customer service plan:

- Step 1. Assign the customer to a FSC Community Readiness Professional
- Step 2. Conduct a comprehensive assessment and define results
- Step 3. Prepare a customer service plan.

Step 1: Assign customer to a FSC Community Readiness Professional. Your FSC has a procedure for assigning FSC Community Readiness Professionals to customers who are served via the “advanced” customer service track. All FSC staff are expected to be familiar with this procedure so that this assignment process occurs quickly. The FSC Community Readiness Professional assigned to the customer is responsible for setting up a meeting to begin the process of individualized service and support. This scheduling may occur at the time of the customer’s initial visit or the assigned FSC Community Readiness Professional may set up a meeting as a follow-up to the initial visit. In any case, contact should occur as soon as possible after the screening, preferably within 24 to 48 hours.



The initial contacts with the customer are important because so much is to be accomplished. **First**, you are establishing a relationship with the customer and wanting to begin to win their trust so that you have their support and participation in the process. **Secondly**, you are informing the customer on the process by which you will be assisting him/her and seeking their buy-in. **Third**, you are reviewing the particulars of the customer’s request or concerns. To be prepared for these contacts, you are encouraged to review the [FSC Customer Service Worksheet](#) (if it was used) and screening notes so that you are familiar with the customer issues of concern and any other pertinent information (such as customer profile).

Step 2: Conduct comprehensive assessment. The process of assisting the customer begins with ensuring a comprehensive assessment has been conducted. The purpose of this assessment is to:

- Ensure that all of the customer’s needs/problems/concerns have been identified and determine the key issue(s) that need to be addressed
- Establish customer goals and the specific results desired
- Determine what assistance is needed and how this assistance might be delivered
- Identify the timeframe in which the services/assistance are to be provided.

This assessment process should be conducted in such a way that it appears seamless with the initial screening assessment and is not overly burdensome to the customer. Keep in mind that a great deal of information was obtained during the screening and therefore you may want to contact the FSC staff member who conducted the screening (if you did not conduct the initial

During this process, avoid rushing to conclusions about the potential solution. Keep in mind that not all problems require a formal services solution. It is important to understand as much as possible the strength of the support systems surrounding the person or family and the extent to which these support systems have been accessed by or are accessible to the customer. It is always best to help the customer use their own resources to the extent possible and only provide those services that complement and do not undermine their personal systems of support.

Step 3: Prepare customer service plan. After you have completed your assessment and formed potential solutions in your own mind, you will need to discuss possible options with the customer to determine the assistance and actions that might be taken to address the customer's concerns. Your responsibility is to work together with the customer to develop a customer service plan that specifies the services to be provided and the actions to be taken to achieve the expected results. This discussion should focus on both your role and assistance and the customer's role and actions. Both are needed to increase the chances that the customer will achieve their desired results and the issues and concerns will be adequately addressed. You should establish a timeline with the customer for implementing planned activities and actions.

What is a Customer Service Plan?

A customer service plan specifies the course of action that will be taken to address key issues of concern to the customer. This plan is developed through dialogue with the customer and specifies the services and actions to be provided to the customer as well as expectations of the customer.

Determine the customer's actions. You and the customer should discuss and agree on the actions that the customer will undertake alone or with support from you. To the extent possible, you should encourage customers to take on as much as they can handle. Customers assume ownership of the process. More importantly, customers gain confidence in tackling issues successfully on their own.

Determine the FSC's actions. Based on what the customer has agreed to do, you should then identify what actions you will undertake to help the customer successfully address the issues of concern. In many instances, your role will be to provide support such as: registering the customer for a FSC class, providing written materials, gathering information from on- or off-base service providers, or demonstrating the use of computer resources at the FSC. You also may make a referral to another person or agency and can offer to make the contact on their behalf if that is desired. In some cases, you may need to ensure a specialized service is developed (e.g., a special briefing for a school). By listing your support roles, you share in the partnership in accomplishing the results that the customer desires.

Note in the example provided on the worksheet below, "Customer Responsibilities" and "FSC Responsibilities" are identified along with proposed dates for completing activities.

FSC CUSTOMER SERVICE WORKSHEET (Example)

Customer responsibilities:

Dates for assistance:
(enter target date & check when completed)

Couple to review *SITES* info on Patrick AFB
Today_____

Couple to attend Smooth Move class at the FSC
March 10 7:00 pm

Diane to contact Bill Warren at Patrick about spouse jobs
NLT March 15__

Jim to talk with his first sergeant and Cheryl Jones,
 NLT Tuesday__
 his FSC UL, about unit sponsor at Patrick

Diane to contact Carol Johnson at CDC re childcare contact
NLT Wednesday
 at Patrick (she is expecting call at 2-7755)

FSC responsibilities:

Demonstrate how to use *SITES* computer program
Today_____

Register both for Smooth Move class at the FSC
March 10 7:00 pm

Contact Bill Warren at Patrick for spouse job assistance
Today_____

- Give his number to Diane
- See if he can send job listings for accounting openings

Alert Cheryl Jones about Sgt. Smith and need for sponsor
Tomorrow 3/2__

Task 3: Provide FSC Services

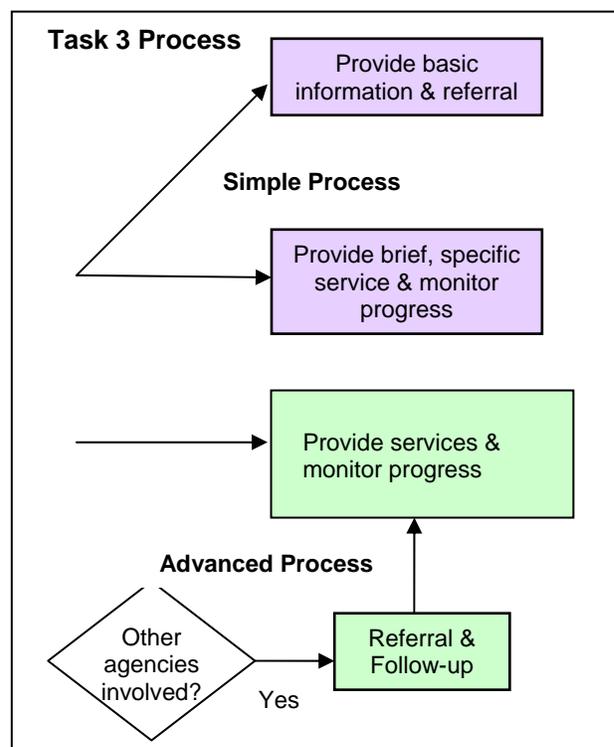
This section describes the process for delivering three different types of FSC services to customers after they have been screened (Task 1):

- Basic information and referral (simple process)
- Brief specific services and monitoring (simple process)
- Customer service plan activities and monitoring (advanced process).

For those customers who will be served via the “simple” process, customers will receive FSC services immediately following the screening by the FSC staff member conducting the screening. The majority of FSC customers will be served in this manner. The reason for serving customers in this manner is twofold. First, by giving customers what they want after having assessed their concerns, the service can be individualized. Secondly, by having FSC staff who conduct the screening provide services right away, the customer feels it is easy to do business with the FSC. There is no hand off to another staff member. This section provides guidelines on the provision of FSC services to these customers.

For those customers being served by the “advanced process,” this section discusses the implementation of the customer service plan developed by a FSC Community Readiness Professional (Task 2).

A key objective in delivering FSC services is to support customer self-sufficiency. As a result, FSC staff are encouraged to utilize a supportive approach and avoid taking over customer’s responsibilities. This means, for example, encouraging customers to contact referral agencies themselves rather than you making the contact.



Type 1 FSC Service: Basic information and referral

Information and referral services have two components. Whether a customer receives 1) information and 2) a referral depends upon the nature of the customer’s request. When “information” services are provided, the customer is given information either orally or in written materials that pertain to the issue/problem/situation the customer is trying to address. When

“referral” services are provided, the customer is referred to other agencies where assistance or specific information can be obtained. The information and/or referrals provided to customers are to be documented in the appropriate customer service record-keeping system.

The customer requests that prompt this type of service often appear in the form of questions and can cut across a wide range of issues. Customers’ questions can range from the simple (e.g., how do I get to the childcare center on base, what are your hours) to the complex (e.g., where can I find information on elder care services for a parent who lives in another state).

I & R service is an appropriate response to customer requests when it is determined at screening that this is the type of customer support needed, the customer can address the issue on his/her own, or the issue does not fall within the FSC mission. I & R services are provided by the FSC staff member who conducts the screening. FSC staff may use the comprehensive information/ referral database located in an Air Force statistical tracking tool. FSC staff can also refer the customer to Air Force One Source for assistance or actually do the research themselves.

Guidelines on delivering information and referrals to customers include:

- Provide the materials that contain information that will help the customer address his/her concerns; the intent is to be selective in picking out the most salient information/ materials
- Identify the point of contact for agencies who can provide the services needed by the customer; Identify more than one agency if available and appropriate so that the customer has options; Also, identify alternative resources when available
- Provide guidance on how customers can approach agencies to get the help they need
- Offer to serve as an advocate or to facilitate connections, when necessary (e.g., when customer needs someone to represent them or speak on their behalf to get a needed service)
- Provide accurate and relevant detail about the agency/service so the customer knows what to expect and sees the value of the proposed service

What Types of Customer Requests Get I & R Services

The following is a list of illustrative examples of I & R Services, but is not a complete listing.

- Directions to base or community locations
- Base map
- Procedures for military programs (e.g., sponsorship, AF Aid)
- Hours (of FSC operation, FSC classes, etc.)
- Request for document or materials FSC has
- Access (e.g., how to access loan closet, web site)
- Eligibility requirements for FSC or other services
- Unit or community support resources (e.g., support groups)

- Provide all the appropriate information and referrals that appropriately address the customer's issues of concern
- Conduct research to obtain the information or find the service needed, when necessary, and provide this to the customer as soon as possible. Don't forget to utilize Air Force One Source as a resource to obtain relevant information.

Follow-up is also a key element of providing quality information and referral service. Strategies for customer follow-up are discussed under Task 4.

Type 2 FSC Service: Brief specific services and monitoring

Direct services are the heart of the FSC and where the FSC provides information, education and short-term support that will help individuals and families develop competencies and coping skills to handle military and family life issues. These services are offered on a short-term basis and are offered in core areas of service. These services cover a wide array of activities that include classes, briefings, assistance with computer software and searches (e.g., resume writing, employment searches, SITES, e-mail to deployed service member), lending closet (i.e., Airman's attic, loan locker), food pantry, assistance with application forms (e.g., special needs, financial aid, etc.), and training.

Step 1: Provide brief specific services. Some of these services will be provided to customers immediately following screening, whereas other services will be delivered to the customer at a later date after screening. In situations where the customer will receive the service later (e.g., a class), the customer should be signed up for the appropriate service (e.g., class) at the end of screening. Given the variety of services offered in this category of FSC services, different FSC staff will be involved in serving FSC customers. All services provided to a customer are to be documented in the customer tracking system utilized by the FSC.

To the extent possible, you should help the customer achieve their immediate goals by providing as much specific assistance as you can immediately following the screening. The list below provides examples of the assistance that can be provided at the time of the customer's initial contact with the FSC.

- Get the items from the loan closet or food pantry or the written materials discussed
- Log on to the computer and provide tutorial or as much assistance as necessary for customers to be able to use computer programs (e.g., SITES, employment database/searches, resume writing, communicate with deployed service member)
- Assist in completing application forms/paperwork if customers need help rather than just handing them a form.

Guidelines on ways to deliver brief services to customers to provide high quality customer service:

- Use the information from FSC Customer Service Worksheet or other FSC screening form to tailor services to the customers who are expected to attend the sessions
- Inform attendees of class or consultation objectives (i.e., results trying to achieve)
- Provide accurate information that customers can use in planning and making decisions
- Make eye contact
- Limit class sizes to the number that can be adequately served
- Encourage customer questions and comments (to build customer relationship through interactions and get customer feedback)
- Listen and take note of customers questions and comments (more will be said about this in Task 5)
- Observe nonverbal communication (i.e., body language) (more will be said about this in Task 5)
- Offer to provide individualized assistance if needed after class is over
- Provide resource information (point customer to where they can go for further information or get support with individual problem)
- Follow these same guidelines when services are offered outside of the FSC (e.g., units, community settings, housing area, satellite locations).

Step 2: Monitor brief specific services. Monitoring the services provided and the results achieved by customers is important. The purpose for monitoring is to:

- Make sure customers receive service(s) they requested or were identified through screening - The FSC may elect to track customers who at screening were referred for a brief FSC service. For example, this means taking attendance to determine whether the customers who were signed up for an FSC class showed up for the class.
- Monitor customer progress in completing services
- Identify and address additional problems that may arise as services are being used, including referring the customer to an FSC professional to conduct a more comprehensive assessment of issues and develop a customer service plan

- Handle dissatisfied customers or those who drop out of classes or other services that were recommended. Remember, excellence in customer service includes determining reasons for customer dissatisfaction, dropping out of services and or not carrying out their plans.

In all likelihood, different methods will be used to monitor each type of FSC “brief” service or activity. FSC staff are responsible for monitoring the customers they serve for the activities that they provide. Thus, all FSC staff will be involved in monitoring. Ways to monitor include:

- Attendance at activity (attendance at first session, percent showing up for activity, percent completing activity)
- Check off on FSC Customer Service Worksheet those services given during the initial contact.

Type 3 FSC Service: Customer service plan services and monitoring

This section discusses the process of implementing customer service plans and monitoring activities.

Step 1: Implement customer service plan. FSC Community Readiness Professionals who develop customer service plans will be responsible for facilitating the implementation of these customer service plans. The activities and support by a FSC Community Readiness Professional will vary across plans but may include any or all of the following:

- Encourage and support customer with their responsibilities
- Provide a specialized service (e.g., financial counseling, help family with special needs child interpret laws and get services needed), if you have the expertise to assist on the issue(s) in the customer service plan
- Contact and coordinate services with other FSC staff if they are more appropriate to assist the customer
- Manage referrals to other agencies and services. This should include:
 - 1) Explain the value of the referral to the customer and what they can expect from the referral agency
 - 2) Notify a person in the other agency that you are making or have made the referral and discuss reasons to verify the agency’s services will address customer’s issue(s)
 - 3) Assist the customer in making the appointment by providing the name and phone number of the contact person in the agency

- Work with Unit Leadership to gain any needed support for customers to receive services, if necessary.

Step 2: Monitor customer service plan. Monitoring is particularly important for customer service plans because an array of services and activities will have been specified. Given the one-on-one working relationship with customers, monitoring will be easier. The purpose for monitoring is to:

- Make sure the plan is implemented as recommended (i.e., that the customer is receiving expected services)
- Follow-up with the agency contact and with the customer to determine if appropriate progress is being made or if any other FSC assistance is required
- Help the customer stay accountable for the actions they agreed to do (i.e., to monitor customer progress in completing services/performing tasks)
- Ensure accountability of the FSC to the customer—to be able to determine if you did what you said you were going to do
- Identify and address problems that arise
- Work with the customer to make any necessary adjustments to the plan, if needed
- Provide feedback to the FSC and other service providers.

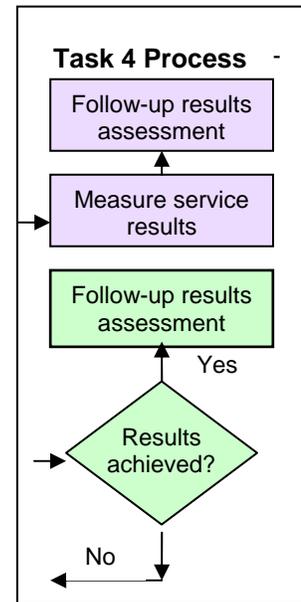
The FSC Customer Service Worksheet can be used to guide monitoring efforts. How you will monitor activities, especially customer activities, needs to be discussed with the customer. Monitoring will require you to:

- Verify that FSC services were provided to customer
- Conduct any follow-up on referrals
- Meet periodically with the customer to assess and document progress
- Verify with agencies that services were provided to customer through meetings or brief phone calls
- Work with FSC staff and agencies on customer participation, as needed.

Task 4: Evaluate Results of FSC Services

A customer-oriented organization seeks customer feedback. Evaluations are a method of using customer feedback to determine what results have been achieved for the customers served. Evaluations can also be used to determine if results have been sustained for some period after services were rendered. Such findings are important in determining how effective the FSC is in helping personnel and families cope with military and family life demands. In the Customer Service model, evaluations should be conducted at two points in the customer service process:

- Immediately after services are delivered (short-term assessment)
- Some months later at a time determined by your FSC (follow-up assessment).



For evaluations conducted with customers served through I & R or a brief service (i.e., “simple process”), the evaluation data collection instruments can be standardized. In other words, the FSC can use one form for all customers receiving a particular FSC service (e.g., I & R, a pre-deployment briefing, budget management class). For customers served via the “advanced” process, FSC Community Readiness Professionals will need to tailor customized evaluations for each customer served. To minimize the burden on FSC staff (and in particular any individual staff member), collaboration and teamwork can be beneficial in the development and conduct of these evaluations. The focus and process for conducting short-term and follow-up assessments are detailed in the following sections.

Short-Term Assessment. The purpose of conducting an evaluation immediately after services are delivered is to assess whether the desired results have been achieved and to assess the effectiveness of the services/activities rendered. This is necessary to determine the next steps in serving the FSC customer.

- For customers who received brief service, the key questions are:
 - Was the information/assistance provided helpful?
 - Did the information/assistance give the customer the knowledge or an understanding of how to address an issue?
 - Did the customer learn a new skill or enhance their skills?

The objective in asking these types of questions is to determine whether the FSC services rendered helped the customer. Help is defined here as having provided the information, access to a resource, or taught a coping skill that can be used by the customer to address an issue. These questions can be posed to customers on customer feedback cards or activity evaluation

forms given to customers at the end of service provision (e.g., last class). The FSC may elect to tailor the questions on activity evaluation forms for different FSC services/activities (e.g., financial management class, pre-deployment briefing, SITES). FSC staff's observations of customer behaviors while serving them can also be used as an assessment method.

- For customers who had a customer service plan, questions can be more specific and tied to the goals and expected results defined with the customer. The data can be collected based on your documentation of the customer's progress, conversations with customer, and, if necessary, an evaluation form. Results of this assessment should be shared with the customer to determine any next steps that might be recommended.

It will be important for the FSC to conduct these assessments in a timely manner. Based on the findings obtained, a decision will need to be made about the specific follow-up steps the FSC might take with a customer. Depending upon the short-term assessment findings, the follow-up provided to customers will be one of the following actions:

- Refer customer to a FSC Community Readiness Professional for re-evaluation of customer needs and development of a customer service plan. This will occur for those customers who received a brief specific FSC service but for whom the service did not meet the customer's needs or other issues were uncovered and the customer has agreed to work with a FSC Community Readiness Professional. The FSC will need to have an established procedure for notifying appropriate staff.
- Sign the customer up for a different brief service
- Refer customer back to the FSC Community Readiness Professional who was assisting the customer for a reevaluation of needs if necessary and revision of their customer service plan
- Provide customer with a referral to another agency
- No follow-up at this time is needed. Contact will be made with the customer later to determine if longer-term results were achieved (see next section).

Follow-up Assessment. An FSC staff member should contact all FSC customers approximately 3 months after receipt of assistance. A customer tracking tool may automatically help with this by generating a reminder and follow-up document that can be forwarded to each customer. The time period for follow-up could be shorter for selected services but by 3 months, a follow-up contact should be made. The purpose of the follow-up is to determine:

- If the FSC service successfully met customer's needs (i.e., the customer was able to use the information, resource or skill to resolve a work/life issue)

- If the results that the customer had hoped to achieve were indeed achieved (i.e., there has been a positive change in the customer's situation or crisis was avoided or problems minimized)
- If the customer was satisfied with services received, is likely to use a FSC again in the future if needed, and if the process for assisting the customer can be improved in any way.

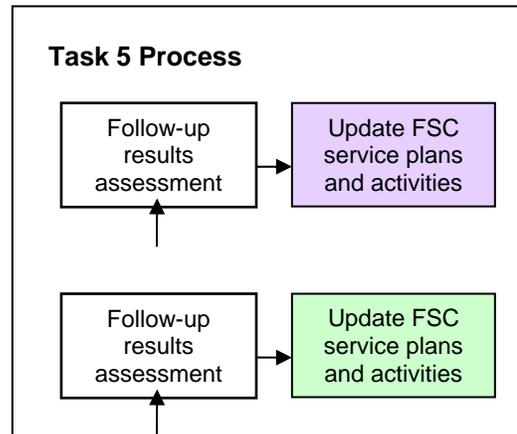
Several different methods can be used to conduct this follow-up assessment:

- Phone call by a FSC staff member. This call would be conducted using a form in which specific questions are asked and answers recorded. Using a structured format allows for consistency across telephone interviews and a systematic way to collect data. This will enable staff to easily analyze data for different FSC services.
- Short questionnaire sent to customers after a service is rendered. This could be standardized across FSC areas of service or customized for specific services such as a class or use of SITES or other activities. Ideally, this would be a one-page form that could be folded and sent back to the FSC. Responses from FSC customers will be greater if the number of questions is limited and follow-up questionnaires are sent to those customers who fail to respond to the initial questionnaire.
- Short questionnaire sent through the unit chain of command when customers received services via a unit event or activity. This would be offered in a manner similar to the method above but the questionnaires would be returned to the FSC Unit Liaison on behalf of the FSC Professional who provided the service.

The results of the follow-up assessment should be analyzed by FSC staff. FSC staff who are responsible for providing particular FSC services may be asked to analyze and summarize data pertaining to the services they offer. However, the analysis of the evaluation data will require the involvement of all staff. To analyze data, FSC staff will need to calculate totals and percentages for questionnaire and interview data. Then staff will need to prepare a summary of the findings. This summary should highlight to what extent desired results have been achieved, level of customer satisfaction with FSC services, and customers' recommendations for service improvements. These summaries should be reviewed and discussed by FSC staff with the FSC Flight Chief. (This will be discussed further in Task 5.)

Task 5: Reassess FSC Services and Customer Support

For the FSC to be responsive to its customers (and the military community), the FSC needs to give attention to harnessing and using information from and related to its customers. Throughout the customer service process, the FSC will have opportunities to collect information from customers that can be used to guide FSC planning, services and customer service and role in enhancing community readiness. The FSC should have a formal process for collecting, reviewing and discussing this information. Reviewing and using this information will help the FSC keep its finger on the pulse so that the FSC can prepare and respond effectively to customers and ensure that services do not remain static. In this manner, the FSC can adapt to and meet a broad array of issues and changing needs.



As a professional providing customer service to FSC customers you need to participate in this process. Although you (and the FSC) need to formally seek information on what services are needed and how well services rendered are addressing customer concerns, it can also be obtained informally. The information and ways in which information will be available to you (and the FSC) are detailed below:

- **Customer Feedback:** During screening, customers may reveal what FSC services customers have used or assistance received and their perceptions about this service and support – When this information is revealed in screening interviews, you should take notes and at some point similar notes taken by other FSC staff who are screening FSC customers should be summarized. This summary needs to be shared with FSC staff. It is important to ensure that these notes and the summary make a distinction between customers' experiences with FSC services received at your base versus another military base.
- **Customer Assessment and Worksheet Reviews:** FSC Customer Service Worksheets or other paperwork can be used to record the types of customer requests received and the I&R provided to customers. A review of this information can be used to monitor work/life and community readiness issues of concern at the base. In reviewing this information, you and your FSC staff colleagues can identify emerging issues and patterns (such as what issues often appear together and what issues are of concern to particular groups).
- **Services Evaluation Forms:** Monitoring of services and customer service plans can reveal both strengths and weaknesses in service delivery or in working with agencies. Both positives and negatives need to be pinpointed. Questionnaire responses collected immediately from customers after they have received a service or activity can reveal

customers perceptions of services rendered, the helpfulness of services, and whether initial customer goals and results were achieved.

- Follow-up Surveys: Follow-up questionnaire responses from FSC customers three or more months after they have received a service(s) and implemented the strategies in their lives can reveal what results are being achieved and customer satisfaction.
- FSC Staff Reviews: Input should be sought from FSC staff on how well the FSC's customer service process is working and recommendations for improvements.
- Outside Agency Reviews: Feedback from agencies should be sought on the appropriateness and effectiveness of referrals. FSC staff will need to interview or send questionnaires to obtain this feedback.
- Unit Leader Surveys and Reviews: Feedback will be required from unit leadership on how well the people in the units are functioning after receiving FSC services. FSC Unit Liaisons can be asked to solicit this feedback from the units served.

This wealth of information can be used to guide FSC planning and activities to:

- Define what are reasonable personnel and family results from FSC services
- Set new or emerging priorities for the FSC and its services and activities
- Reshape FSC services as needed and promote effective FSC services
- Revise and/or develop materials as needed and promote the development of new or more appropriate materials to support customers
- Revise and/or develop tools (e.g., FSC Customer Service Worksheet, screening protocols, evaluation instruments) as needed
- Network and enhance connections with other agencies
- Revise FSC protocols and procedures
- Reexamine staffing assignments for screening, service delivery and evaluations
- Develop and conduct staff training.

All systems of customer service need adjustments. Adjustments are necessary to provide the highest level of customer service that the organization can provide. For the FSC, serving customers is an ongoing learning process and requires making small changes periodically to fulfill its mission to the military community.

PART 3: GETTING READY TO PERFORM CUSTOMER SERVICE TASKS

This section is designed to help you (as an FSC staff member) prepare to implement the five customer service tasks described in Part 2 of this Guide. Information and assessment tools are provided to help you assess your current *knowledge*, *beliefs*, and *skills*, so that you can take appropriate steps to ensure that you are adequately prepared to perform FSC customer service duties. Your FSC may conduct training in some of these areas. Other base and community agencies, local schools and colleges, and professional associations in your area are sources for additional training.

WHAT IS IMPORTANT TO KNOW

You should know the following to effectively address customer issues and concerns:

- ✓ FSC mission and goals, including AFI's that guide FSC personnel, programs, and services
- ✓ FSC customer service goals, tasks, and procedures
- ✓ Core content of FSC services (especially in core areas), as well as evaluation strategies and desired results measures for FSC services
- ✓ Service member and family issues at your base and in your units as well as local retiree community and civilian employee issues
- ✓ Prevention and early intervention practices for work/life and community readiness issues
- ✓ On- and off-base agency services and procedures, including IDS and CAIB organizations and processes
- ✓ Basic military information and protocols
- ✓ Basic counseling and intervention techniques.

Know FSC mission and goals, including AFI's that guide FSC personnel, programs, and services. As a member of the FSC staff, you need to understand the FSC mission and goals, be knowledgeable of all agency operational guidelines, and have a working knowledge of relevant AFIs.

Know FSC customer service goals, tasks and procedures. As the initial face of the FSC with customers, you need to know FSC customer service goals and the principles outlined in Part 1 of this Guide. You are more likely to meet FSC expectations if you understand how customers are to be served. The tasks detailing the procedures for successful customer service are outlined in Part 2 of this Guide.

Know the core content of FSC services, as well as evaluation strategies and desired results measures for FSC services. You need to be fully informed about FSC services and procedures. This is true for several reasons. **First**, to answer questions and refer individuals to FSC services, you must know what issues and concerns your FSC is designed to handle and the FSC procedures and forms for particular issues. Even if this is a designated/dedicated FSC staff function, you need to be able to help customers with these procedures as well. **Second**, customers need you to be knowledgeable of FSC resource materials (e.g., brochures, publications) and electronic resources (e.g., PHP-IDS Web site, Crossroads, FAMNET) and in some cases you may even need to directly assist customers in the use of these resources. **Third**, when screening customers, you must be able to determine whether or not the customer needs to be referred to another FSC Professional for development of a customer service plan or whether the customer can be assisted through I & R or a brief, specific service(s) offered by the FSC. This knowledge will allow you to be responsive and be able to determine how to help customers address their issues when they seek assistance from the FSC.

Know service member and family issues at your base and in your units, as well as local retiree community and civilian employee issues. Knowledge of personal, family and community issues (especially with regard to work/life, mission readiness, recruitment and retention) will allow you to:

- 1) Screen customers (to know what questions to ask when a particular work/life issue is identified, to know what questions to ask to follow-up in other work/life areas, and to know what questions to ask of different customer groups),
- 2) Determine how to tailor FSC services to effectively address specific customer issues,
- 3) Communicate with unit leadership for those services to be provided in units, and
- 4) Identify desired results for FSC services.

All FSC staff are expected to have a comprehensive base of knowledge on these military community issues:

- Personnel profiles, including pay grade and household types
- Deployment patterns and current deployment challenges
- PCS patterns, bases from and to which personnel frequently move, and current PSC challenges
- Neighborhoods and communities where people live and variations in services, schools and stressors that may be associated with these specific locations
- Family stressors and relational, personal, financial, and health indicators

- Current OPSTEMPO status and work-related stressors and stresses
- Financial issues at the base
- Current transition patterns for military members
- Employment issues for spouses
- Status of unit sponsorship efforts.

A number of ways exist to keep up-to-date on these (and related) issues. You can read base and Air Force newspapers, talk with other FSC staff (including Unit Liaisons) and other agencies serving the community about current work/life and community readiness issues, attend community forums, meet with personnel from the Military Personnel Flight, monitor Air Force Web sites, and review results of Air Force Community Assessment Survey and other surveys as they relate to your base community. Your goal is to be an expert on your Air Force community and its members.

Know prevention and early intervention practices for work/life and community readiness issues. You must be familiar with the professional literature on prevention and early intervention practices for work/life issues and on collaboration practices. This will help you screen customers on issues (e.g., know risk and protective factors for work/life issues), devise appropriate customer service plans and make appropriate referrals (i.e., identify resources for different work/life issues). Given the vast array of work/life issues that your FSC must deal with, and the importance of keeping up-to-date on this literature, you may be asked to monitor a particular area and keep the FSC (and other FSC staff) informed. Knowledge of collaboration practices may be helpful for when working with customers such as unit leadership and organizations as well as in engaging other agencies to assist FSC customers.

Know on- and off-base agency services and procedures. You need to be familiar with local base and community networks and resource directories if you are to provide customers with timely and accurate referral information. You also need to have content knowledge about base and community programs and services available to FSC customers, including: point of contact/staff, program offerings, eligibility requirements, forms and procedures, hours and location of service, and fees, if applicable. In addition, you need to know how to access information from Air Force (and DoD sponsored) information resources, as well as from reliable state and national information sources, such as federally funded clearinghouses.

In all likelihood the FSC has a directory of community agencies and it will not be necessary for you to develop your own directory. In order to facilitate customer connections with an agency or to contact an agency on behalf of a customer, it will help if there is an established relationship with the agency (in some cases this will require you to communicate with your FSC colleagues who may have ongoing relationships with those agencies where you typically have not had

extensive direct contact).

Know basic military information and protocols. It is essential that you have basic knowledge of the military (especially the Air Force) – its structure, customs, and terminology. Knowing military terminology, customs, and rank and insignias is important in order to follow military protocols. This is a basic requisite for being able to effectively communicate in this unique environment. Being familiar with readiness, recruitment and retention policies and goals will help you to understand unit leadership and military personnel concerns.

Know basic counseling approaches and techniques. As you provide help to customers, you will be counseling them on how they can best address their concerns. Your counseling is intended to strengthen customer knowledge, attitudes, motivations, self-confidence, life skills, and social support. Even your brief interventions can result in positive customer outcomes.

Your counseling efforts will usually be focused and brief. You will work directly with customers to quickly identify realistic, achievable, and measurable goals and strategies that can move them toward addressing the issues that brought them to the FSC. You are also trying to identify and promote customer strengths and assets that can be used throughout the counseling process.

Although there are many useful counseling approaches and techniques in the professional literature, the Canadian Task Force on Preventive Health Care has developed a general approach to behavioral counseling that has proven useful across a wide spectrum of populations and intervention issues. The U.S. Public Health Service has also adopted this approach. Called the “Five A’s,” this approach focuses on the following tasks and associated techniques:

Assess: Ask about and assess the issues affecting the customer, their goals and strategies they may already have tried in order to achieve their goals.

Advise: Give clear, specific, and personalized change advice, including information about positive and negative consequences they may experience as they work toward achieving their goals.

Agree: Collaboratively develop goals and methods of achieving them based on the customer’s interest and willingness to change.

Assist: Aid the customer in achieving agreed-upon goals by helping them acquire the knowledge, skills, confidence, and support necessary for change. Coordinate with related services, as necessary (e.g., mental health counseling, spiritual support, financial assistance, education benefits, child care assistance, etc).

Arrange: Schedule follow-up contacts to provide ongoing assistance and support and adjust the intervention plan as needed, including subsequent referral to more intensive or specialized services as required.

WHAT IS IMPORTANT TO BELIEVE

Your attitudes and beliefs will influence your abilities to work with customers effectively. Thinking positively, believing in your ability, and working proactively are essential to achieving success. How strongly you agree with the following statements reflects your ability to meet FSC expectations for customer service:

- “People facing problems often need more than a single solution!”
- “Self-sufficiency is better than dependency!”
- “I can make more of a difference if I listen more than tell!”
- “Collaboration works better than independence!”

“People facing problems often need more than a single solution!”

I need to believe that:

- ✓ “One size does not fit all people problems!” I need to find the right solution(s) to meet the individual needs of each customer.
- ✓ Problems and issues people face often come in packages.
- ✓ The presenting problem or issue may be a symptom of the real underlying issue or issues.

“Self-sufficiency is better than dependency!”

I need to believe that:

- ✓ My role is to help FSC customers find their own solutions and answers.
- ✓ FSC customers have many resources they can access to address the issues they confront.
- ✓ My job is to help FSC customers realize and utilize their own strengths and resources.

“I can make more of a difference if I listen more than tell!”

I need to believe that:

- ✓ There is truth in the old saying that “You have 1 mouth and 2 ears for a reason!”
- ✓ Customers often know what their problems or issues are and hearing their story is critical to providing good service.
- ✓ A good assessment is key!

“Collaboration works better than independence!”

I need to believe that:

- ✓ Good customer service is establishing a partnership with the FSC customer.
- ✓ Engaging other parties in the solution, including unit members, other agency personnel and appropriate community groups is more likely to yield a better result for the customer.

WHAT IS IMPORTANT TO BE ABLE TO DO

In order to perform the customer service tasks, you need certain skills. Examine how well you can do the following:

- ✓ Research information relevant to customer issues and developing services/activities
- ✓ Conduct customer screening and assessments
- ✓ Provide and integrate services in the core FSC work/life areas
- ✓ Develop a comprehensive action plan that addresses customer issues
- ✓ Monitor your service delivery activities
- ✓ Evaluate the results of your service delivery activities.

Research information relevant to customer issues and developing services/activities. In order to provide accurate information and to help customers on an array of work/life issues, you will need to have the ability to:

- Determine and gather the information you need

- Identify reliable sources where you can get the information needed
- Read research reports, survey reports, books, and other subject matter documents
- Review FAMNET, CROSSROADS and the base People Helping People-Integrated Delivery System Web site
- Access Air Force One Source database
- Attend informational meetings and conferences
- Organize, analyze and summarize information/data
- Contribute to the development and maintenance of a subject matter library for the FSC
- Share and discuss information with other FSC staff.

Conduct customer screening and assessments. All FSC customers are to be screened (Task 1). If you are assigned this task, you will be responsible for asking a sequence of questions to identify customer concerns. This screening is likely to be standardized (i.e., set protocols determined and used by your FSC). For customers requiring individualized assistance (where a customer service plan will be developed), an in-depth assessment will be conducted by a FSC Community Readiness Professional assigned to work with the customer. The focus of this further assessment will be determined by the staff member's assessment of what additional information is needed to understand the nature and scope of all problem/issues presented by the customer. In order to perform customer screenings and assessments, you will need to be able to:

- Use and implement FSC protocols and procedures for screening (this includes knowing what are the follow-up questions to ask when a particular work/life issue is identified)
- Communicate a synopsis of your screening to the FSC staff member assigned to assist the customer. This should include providing this staff member information or insights that are not recorded on the screening form that would be beneficial for this staff member to know in working with the customer
- Develop individualized assessments for those customers you are assigned to assist (this includes reviewing the information obtained from the initial screening and determining what follow-up questions need to be asked, exploring with customers how issues have been handled in the past and from where assistance was sought, examining what strategies by the customer have worked and not worked in the past, getting the customer's perceptions about the helpfulness of the assistance provided to him/her)

- Tactfully address important issues that customers may be initially reluctant or hesitant to discuss
- Use techniques that put customers at ease
- Earn customer's trust
- Know when to stop asking questions (i.e., to complete the screening or customer assessment)
- Communicate a thoughtful synopsis of your complete assessment to the customer (before formulating a customer service plan with the customer).

Provide services in the core FSC work/life areas. As a “multi-function professional” you need to be able to perform a variety of services. Your FSC will establish what basic services you (and all FSC staff) should be able to provide to any customer. In addition, you may be responsible for delivering specialized services. As the FSC obtains information on best practices and evaluation data on its own services, you will need to modify services accordingly. You will need to develop a comfort zone and skill to:

- Learn and perform FSC protocols and procedures in each core FSC area; Have some level of skills and knowledge of FSC services focusing on work/life and community readiness
- Deliver specific FSC services
- Develop services/activities based on promising practices for addressing work/life issues, if you are assigned to develop a service/activity
- Develop cross-cutting services/activities, if you are assigned to develop a service/activity
- Revise service/activities based on evaluation results, if you are responsible for providing a particular service/activity
- Deliver FSC services in settings outside of the FSC. This includes being able to perform FSC protocols and procedures in any setting (e.g., being able to go to a unit and provide a workshop on transition, being able to give a briefing on deployment-related issues in a school or chapel setting). (The Community Readiness Unit Service Guide for Air Force Space Command Family Support Centers discusses how the FSC will provide services to units.)

Develop a comprehensive action plan that addresses customer issues. Task 2 of the FSC customer service function entails developing customer service plans. If you are assigned responsibility to perform this task, your role is to help the customer (whether he/she is DoD

personnel, family member, military leader, or organization) determine an appropriate and acceptable course of action. This customer service task will entail working collaboratively with customers to determine priorities and identify strategies and actions that will effectively address their concerns. These strategies and actions will be noted in some type of customer service plan that can be monitored and results evaluated. In order to assist customers effectively through the planning process, you will need to be able to:

- Identify issues of concern through an in-depth assessment (see conduct screening and assessments above)
- Report your synopsis of assessment findings to the customer
- Discuss and get agreement on the customer's priorities
- Translate priority issues into desired customer goals and measurable results (note: these results will be what is measured in the evaluation to determine whether the goals have been achieved)

Priority Issue	Desired Result
Service member unable to make credit card payments	<p>Service member has developed and is following a budget after taking a FSC budget management class</p> <p>Service member understands and is practicing principles of consumer spending after attending a workshop on being a good consumer</p> <p>Service member is using an installment plan to pay off his/her debt after receiving debt counseling</p>

- Establish quantifiable results (this means helping customers define measurable results) (see example table above) so that an evaluation can be conducted
- Determine the array of services or strategies that will help the customer meet these results (this includes identifying who will be responsible for providing these services and coordinating efforts both within and outside of the FSC)
- Develop specific and actionable plans that can be understood by all the parties involved.

Monitor your service delivery activities. You will be responsible for monitoring customer progress for those customers that you provide services to either as a “specific brief service” or through a customer service plan. Customers receiving I & R will be “monitored” in the sense that a follow-up assessment will be conducted with them. (This is discussed in detail under Task 4, Evaluate Results of FSC Services.) For those customers you provide a “brief, specific service”, you are responsible for monitoring the customer’s participation and progress. For those customers for whom you develop a customer service plan, you are responsible for monitoring: 1) whether services are being provided by an outside agency to which the customer was referred, 2) whether customer is participating in and their progress in services being provided by other FSC staff, and 3) whether customer is participating in and their progress in services that you provide directly to the customer. To monitor service delivery requires that you be able to:

- Verify that a customer who was referred to the agency is receiving agency services
- Develop a system for checking in with and tracking customers to monitor their progress
- Provide support to and work with customers who do not follow through and/or prematurely terminate
- Work with FSC staff to monitor customer’s participation in services and to solve problems that arise (note: this will likely involve determining what problems you should address and what issues FSC staff want to address themselves).

Evaluate the results of your service delivery activities. It is important to determine whether the FSC has been successful in achieving its desired results and whether these results have been sustained (through a follow-up assessment). As with monitoring, you will be responsible for evaluating (Task 4) those services that you provide. The FSC may develop evaluation tools for services that are offered routinely and for follow-up assessments for I & R services and “brief specific services”. You will need to devise an evaluation strategy for those customers for whom you developed a customer service plan. This can be a difficult task to perform because it requires a level of understanding about evaluation and *Results Management* as well as skills in collecting, handling and analyzing data.

Whether you will be assisting the FSC in conducting evaluations that the FSC develops or developing your own evaluations, to be successful in evaluating services and conducting follow-up assessments, you need to be able to:

- Translate desired results into indicators (i.e., determining what specific data needs to be collected to measure results)

- Determine the appropriate methods for collecting data (i.e., from whom or where do data need to be collected and by what method)
- Develop data collection tools (including learning how to use the FSC's evaluation tools)
- Collect enough follow-up data to determine whether results have been achieved
- Develop and manage a system for compiling and analyzing survey responses, administrative data, feedback and observational data
- Analyze and interpret data
- Prepare a summary of evaluation results
- Study and understand the implications of the evaluation results for you and the FSC.

Assess Your Customer Service Readiness

Evaluate how ready you are to serve FSC customers by responding to the following questions. Honestly rate your readiness by scoring yourself as **(R)** Fully Ready, or **(P)** Partially Ready (still need improvement), or **(N)** Not Ready. Use the answers to identify the areas that most need improvement. You are likely not to be ready until most of your answers are R.

How well do you know?

- | | | | |
|---|---|---|--|
| R | P | N | FSC mission and goals |
| R | P | N | FSC customer service goals, tasks and procedures |
| R | P | N | Content of FSC services and procedures in core areas |
| R | P | N | Evaluation techniques and results measures for FSC services |
| R | P | N | Personnel and family issues |
| R | P | N | Work-related stressors for base |
| R | P | N | Family-related stressors for base |
| R | P | N | Deployment, relocation and transition patterns at the base |
| R | P | N | Staff and programs of on-base agencies |
| R | P | N | Staff and programs of off-base agencies |
| R | P | N | Military structure, terminology, protocols, and rank/insignias |
| R | P | N | Counseling techniques |

To what extent do you believe?

- | | | | |
|---|---|---|--|
| R | P | N | Carefully listening to customers is more important than talking to customers |
| R | P | N | Taking time to get an in-depth understanding of customer issues will result in a better solution |
| R | P | N | I can be more helpful if I promote customer self-sufficiency |
| R | P | N | I need to collaborate with the customer, FSC staff, and other agencies to get good results |

How would you rate your abilities to?

- | | | | |
|---|---|---|---|
| R | P | N | Research information on common customer issues |
| R | P | N | Conduct screening and assessment of customer issues |
| R | P | N | Develop a comprehensive service plan tailored to customer issues |
| R | P | N | Monitor customer service delivery (i.e., customer participation and progress) |
| R | P | N | Evaluate results of FSC services and customer service plan |

Provide services in core FSC areas:

- | | | | |
|---|---|---|--|
| R | P | N | Financial (AF Aid, PFM) |
| R | P | N | Employment (Transition/Career Focus/Volunteer) |
| R | P | N | Relationship development (FLE, I&R) |
| R | P | N | Readiness |
| R | P | N | Relocation |

APPENDIX

FSC Customer Service Worksheet

FSC CUSTOMER SERVICE WORKSHEET

FSC Staff Member: _____

Customer: _____
Telephone Number

Customer Address: _____
Mailing Address

Customer Issues:

Desired Results:

Customer responsibilities:

Dates for assistance:
(enter target date and check when completed)

FSC responsibilities:

Dates for assistance:
(enter target date and check when completed)

Notes: