

Customer Service Action Plan

Listed below are measurement indicators for consumer/customer service that provides an assessment of the level of customer service within the behavioral health organization based on a service focus range of **Client Focus – Consumer Focus – Customer Focus**.

Service Area/Opportunity	Typical Customer Service Concerns	Solution Options
1. Telephone Access:		
• Number of Rings		
• Greeting/Friendliness		
• Time On Hold/Re-Empowerment		
• Background Music/Information		
• Transfer Levels to Staff		
• Protocol for Voice Mail Responsiveness		
2. Physical Facility:		
• Identification Signage		
• Parking Adequate/Clean		
• Landscaping/Flowers/Lawn Maintenance		

- Entrance Clean, Easy to Locate, and ADA Accessible

- Ease of Opening Door(s)
- Lobby Area Appearance/Capacity
- Magazines, Artwork, Furniture
& Carpeting
- Registration/Front Desk Accessibility
- & Hospitality
- Restrooms – Availability/Cleanliness
- Signage – Adequate, Clear & Positive
- Background Music

Service Area/Opportunity**Typical Customer Service Concerns****Solution Options**

3. Reception/Intake Staff:		
• Politeness/Attentiveness/Responsiveness		
• Professionalism/Boundaries/Language Skills/Communication Skills		
• Customer Service Empowerment Level		
• Terminology/Acronyms Utilization		
• Consumer Recognition Wait Time		
• Re-Empowerment Wait Time Protocols		
• Knowledge of Services/Staff		
• Level of Client Wait Time in Lobby		
4. Access to Care:		
• Single Number for Access		
• After Hours Clinical Triage Capacity		
• Clinical Staff Availability		
• Consistency of Screening/Triage		

5. Intake Process:

- Wait Time from call/walk in to Intake

- Efficiency of Financial Intake
- Number of Client Signatures Required
- Number of Forms to be completed by Client
- Number of No Shows
- Satisfaction Surveys for Access/Intake
Process for Shows and No Shows

Service Area/Opportunity

Typical Customer Service Concerns

Solution Options

5. Intake Process (continued):

- Access to Clinician

- Efficiency of Clinical Intake

- Number of Forms Utilized in Intake

- Number of Questions Asked of Client

6. General Customer Service:

- Efficiency of Scheduling Next Appointment

- Managing Customer/Consumer Service Complaint Protocols

- Information on Center-wide Services

- Confidentiality Concerns

- Meeting Special ADA, Language, & Cultural Diversity Needs

- Brochures, Newsletters & Information Bulletin Boards

- Information/Linkage to Community/Self-Help Supports

- Ability of Organization to Listen to Consumer/Customer and Change Organizational Behavior
- Timely and Accurate Client Billings
- Follow up Visit Customer Satisfaction Phone Calls
- Mystery Visitor Program Participation
- Customer Service Focus at All Meetings