**SRG-4 Indicators of Quality for Customer Satisfaction\_Toward a Framework for Evaluating the Nature, Quality, and Value in Customer Relationships**

Our purpose is to respond to the Principal Group that charged the Fundamental Group with the development of a *Framework for Quality: PE Indicators That Speak to Counselors and Customers*. After the first round of discussion, we agreed that we have identified four indicators of quality; Indicator One will track information on the counselor-customer working relationship within the VR process, and Indicators Two-Four will track information on the systems issues that affect a customer’s experience in the VR process.

We envision that as we continue to develop the indicators and frame the context for customer engagement in VR services, we can then implement a change in the current process, seek to evaluate it, modify it, and improve it; this questioning approach will provide senior leaders with a tool for managing VR customer focus. We assert that this is a work in progress and the steps we have taken in our development are as follows:

**FIRST STEP**

We decided that in order to explore the VR process and systems flow within that process, we would concentrate our work on customer satisfaction. We do not wish to burden agencies with an added survey, yet believe that leadership wants to make a commitment to giving the consumers the opportunity to talk more about their experience and relationship within VR. In seeking performance excellence, giving thought to Baldrige Criteria, specifically Customer Focus (3.0) would set a course for strategic mindfulness of customer relationships.

Our first step was to review customer satisfaction literature and review current customer satisfaction surveys as posted on the Summit Group website ([www.vocational-rehab.com](http://www.vocational-rehab.com)). Twelve states were identified, reviewed, and themes identified. The group settled upon these four indicators, and expects some modification in wording as our work continues:

Four indicators of Quality

1. Working relationship with counselor

2. Usefulness of services

3. Employment needs met

4. VR System/Planning

**SECOND STEP**

Our second step was to utilize the Five-Why Question Technique (Scholtes, 1998, p. 267). We believe that without the ‘why’ component in question-asking, then we are missing out on understand the value within VR service provision/development of customer loyalty. We believe that probing deeper within already posed customer satisfaction questions moves improvement efforts past artificial issues and into identifying systemic sources of problems. We agreed that the questions we developed within each indicator would lead off with one overarching question and then have four drill-down questions to probe the consumer deeper on themes pertinent to that particular Indicator.

Each SRG-4 member took two indicators and applied the 5-Why Technique. We maintained alignment with Baldrige criteria for performance excellence, specifically Category 3, Customer Focus. We are advocating the use of a system-oriented framework that can inform VR practice and performance management efforts.

Our purpose is to develop a strategy for listening to the customer and building customer relations through evaluating the nature, quality and value of our relationship. We will use outcomes for performance improvement and identification of innovation. This 5-Why strategy leads to understanding customer preferences and will affect VR sustainability if we understand more fully customer views and behaviors. The vision we have is to make an impact on shared practices, across the VR organization, which influence levels of customer engagement for long-term employment success. We recognize the need for discussion around how and when to administer the framework; thus, we look forward to conversation with SuRGE’s Principal Group.

We seek to understand (based on Baldrige Criteria):

1. What is the process in VR for listening to the voice of customers? With knowledge of customers, VR can tailor its support and service offerings. VR will have a more customer-focused workforce culture, seeks ways to develop new services, and contribute to organizational sustainability.
2. What are the factors that affect customer expectations and loyalty?
3. How do customers use social media to voice impressions with VR services, and how can VR program evaluators and quality assurance specialists monitor and track this information?
4. What dynamics enable customers to engage (i.e., seek information and support from within) with VR? We believe the strategy of 5-Why Technique to inform our Evaluation Framework and Indicators of Quality will help VR to differentiate its customer relationship strategies given the type of customer and time of assessment.
5. What are the complaints that emerge from the strategy and how we can build a foundation for complaint management? Work in this area will allow VR to prioritize improvement, apply change management practices, and organize information throughout the VR organization.

**THIRD STEP**

Our third step was to review development of the framework with the Principal Group. Specific questions on which we would like to focus include:

1. At what level of specificity does senior leadership want? Do we gear the lead-off question under each Indicator toward the counselor’s approach to the process or do we survey on the system-DVR level?

In anticipation of this question, we created Indicator One as an entity to track information on the counselor-customer working relationship within the VR process. Indicators Two-Four will track information on the systems issues that affect a customer’s experience in the VR process (e.g. targeting expectations and complaints). We created this specific framework knowing that if a customer answers that a counselor is not meeting something under Indicator One (working relationship), then we should see indication of unmet needs/complaints under Indictors Two, Three, and/or Four; such indication will prompt inspection within the VR process and among all parties in the VR organization.

1. What do members of the Principal Group especially like/dislike about the Framework?

We would like to remind all SuRGE-4 members of the previous combined call notes, which represent, in part, statements from the Principal Group:

…the systems approach is a helpful lens and will show us how change might happen and where the work is needed to impact change.

…the work to redesign customer outcome is not so much to reduce variation (vs. allow for standardization), but to open up the process for inspection and evaluation.

…we want to focus on improvement by tasking everyone in VR to become a leader and understand leadership competencies.

…the Framework approach may cut the details and lead us to an improved ‘big picture.’

…the Framework is not at all like one for manufacturing, but as a service organization, how do we identify 4-5 variables that will be indicators of quality? Leaders can focus on these indicators so we do not forget our purpose.

…RSA requirement to ask the consumers on their feelings about what is missing; adding questions into the surveys for consumer satisfaction.

…we want information on leadership and to make this available at all levels within the VR organization.

…we want to discern what will be most helpful in reflecting the quality services that will lead to our outcomes on which we have to deliver. How can we engage our staff to be thinking about quality that leads to the outcome?

Questions 3-5 align with Baldrige Criteria for Performance Excellence, considering the VR wants to achieve recognition as a high performance organization (do not specifically have to quote Baldrige, yet research suggests certain focus on alignment leads to better performance):

1. Will this Framework, if sites agree to pilot testing, ultimately create a feedback system that provides continuous feedback to the VR organization (which shows a desire to take action/desire change)?
2. Will the Framework create a culture of customer focus and assist in managing innovation and agility (a characteristic of a high performing organization)?
3. Will the Framework provide the opportunity to personally thank the customer for providing feedback at various points in time of their experience within the VR process (not just at the end, not just for positive feedback)?
4. To what extent can all members of SuRGE-4, Fundamental and Principal Group members participate in a facilitated discussion at the upcoming 6th Summit in Rhode Island to expose others to the Framework and our purpose and vision for focus on VR consumer relationships?

**FOURTH STEP**

After completing a draft of all Indicators (now a total of three), we received verification from the Principal Group in July that these Indicators ask one overarching question to situate the theme of the question. The measure then lists four additional questions with a series of multiple choice bullets (5-Why Approach to any problem an organization wishes to observe).

We developed a PowerPoint presentation of our work on completed Indicators (posted at: <http://vocational-rehab.com/summit-reading-groups/project-development/>). Dr. Darlene Groomes and members of the Fundamental Group are set to present on the approach taken to develop the Indicators of Quality for Customer Relationship tool at the 6th Summit Conference on Performance Management, next month, on September 16th and 17th in Providence, Rhode Island.

We welcome Directors’ participation at the conference and look forward to providing the outcomes and further developments that emerge from our time at this year’s Summit.