

# Customer Service Issues for Research Administrators

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UNIVERSITY

# What is Customer Service?

*(As defined by Wikipedia)*

- Customer service is a series of activities designed to enhance the level of customer satisfaction – *that is, the feeling that a product or service has met the customer expectation*
- The perception of success of such interactions will be dependent on employees “who can adjust themselves to the personality of the guest”



## Who are your customers?

- Faculty
- Staff colleagues at your institution
- Central offices at your institution
- Departments at your institution
- Affiliated hospital, physician's group, VA, etc.
- Staff colleagues outside your institution
- Your University/institution as a whole
- Sponsor agencies
- Others?



# How is Customer Service in Research Administration Unique?

- In the business world:  
    “The Customer is Always Right”
- In our world, that’s not the case



# What is Good Customer Service?

- Good customer service means having thorough knowledge of your services and products, and being able to help customers make the best choices.
- Good customer service is treating customers with a friendly, helpful attitude.
- Good customer service means helping customers efficiently, in a friendly manner.



# So what is BAD Customer Service?



# Examples of Customer Service Errors in Research Administration

- Failure to respond to phone calls and emails
- Failure to be clear and concise in communications
- Failure to process documents in a timely manner
- Promising something by a certain date and failing to deliver
- Saying NO without some consideration of other options



# Responding to phone calls and emails

- Be consistent
- Based on your average numbers, set reasonable goals for yourself
- Example: answer all phone calls by close of business and all emails within 24 hours
- Whatever your policy on weekend and after-hours emails, be as consistent as possible





# Example: clear and concise communication

**From:** [Lori A Palfalvi](#)  
**To:**  
**Cc:**  
**Subject:** FW: Progress on the Biomedical Workforce Initiatives: Upcoming Changes to the K99/R00 Awards and Pre-doctoral Fellowships  
**Date:** Tuesday, February 19, 2013 12:50:14 PM

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My summary

NIH is aiming for a 30% funding success rate on K99/R00 awards in the future. Please see below.

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**Feed:** NIH Extramural Nexus » Rock Talk  
**Posted on:** Tuesday, February 19, 2013 8:45 AM  
**Author:** Sally Rockey  
**Subject:** Progress on the Biomedical Workforce Initiatives: Upcoming Changes to the K99/R00 Awards and Pre-doctoral Fellowships

Complete info

As I [posted](#) back in December, NIH is implementing many of the recommendations proposed by the Advisory Committee to the NIH Director (ACD) [working group](#) that studied the biomedical research workforce. I'd like to draw your attention to several Notices that have been posted in the NIH Guide in the past few weeks, laying out some of the details and providing a bit of background on the ACD recommendations that preceded them.

The ACD working group stated that the NIH Pathway to Independence ([K99/R00](#)) awards provide a proven mechanism for postdoctoral researchers to achieve an independent and they **recommended that NIH double the number of awards**. Also,

Highlights



# Another example: clear and concise communication

Targeted group

From:

[Lori A Palfalvi](mailto:Lori.A.Palfalvi@northwestern.edu)

Subject:

[DOM\\_NICE\\_GROUP@LISTSERV.IT.NORTHWESTERN.EDU](mailto:DOM_NICE_GROUP@LISTSERV.IT.NORTHWESTERN.EDU); [DOMRESEARCH@LISTSERV.IT.NORTHWESTERN.EDU](mailto:DOMRESEARCH@LISTSERV.IT.NORTHWESTERN.EDU)

Date:

TODAY: Self-Assembled Nanoparticles for Gene Delivery  
Friday, February 01, 2013 9:00:59 AM

Date & Title

## Self-Assembled Nanoparticles for Gene Delivery

[Erik Luijten, PhD](#)

Hyperlink

*Associate Professor, Materials Science and Engineering, Engineering Sciences and Applied Mathematics*

DOM NICE (New Investigator Career Enhancement) Group Seminar

**Friday, February 1, 12:00 noon-1:00 PM**

676 N Saint Clair, 6<sup>th</sup> floor Cardiology conference room

All interested parties are welcome to attend. Lunch will be served. See you there!



# Processing documents in a timely manner

- Keep a log of activity
  - document receipt, progress and completion
- Have a contingency plan for periods of excessive workload, i.e., a back up person
- Don't let things pile up while you are Out of Office (see back up person above)
- Cross train people in your area
- As a manager, set expectations and communicate them



# Making promises on delivery time

- Be realistic
- Under-promise and then Over-deliver
  - i.e., promise completion by Friday when you know it will likely be done Thursday
- Have SOPs in place to help gauge delivery time
- Qualify your promise
  - “Barring a catastrophe...”



# DON'T JUST SAY NO!

- You will get a reputation as the person who always says, “NO”
- Your customers may go “shopping” for better answers
- Instead of saying “NO,” have a talk with the person and find out what they are trying to do
- Faculty often speak a different language than we do...



# Customer Perceptions



- **Reliability** (*Deliver, Perform*)
  - How did the proposal submission go?
- **Responsiveness** (*Speed, Urgency*)
  - Did I get back to you in the time frame you expected?
- **Assurance** (*Credibility, Competence*)
  - Did we take ownership of your issue? Do you trust us?
- **Empathy** (*Caring, Understanding*)
  - Did we listen and show concern for the situation?
- **Tangibles** (*Appearance, Atmosphere*)
  - Was the office environment efficient and reassuring?



## **Reliability** (*Deliver, Perform*)

- How did the proposal submission go?
- Ask for feedback during and after the process
- Be receptive to constructive criticism
- Use Survey Monkey or other online survey tools
  - For a larger group, this can ensure anonymity and encourage honest responses (which you DO want)



## **Responsiveness** (*Speed, Urgency*)

- Did I get back to you in the time frame you expected?
- Gauge your customer's expectations and anxiety level
- Communicate to establish realistic deadlines to keep everyone on track
- Be efficient and focused – don't let other people's anxiety affect you!





## **Assurance** (*Credibility, Competence*)

- Did we take ownership of your issue? Do you trust us?
- Show your competence and confidence from the very first meeting
- Be prepared
  - Ask questions early, review the RFA in advance, show up ready to hit the ground running!
- Understand that trust is earned and that can take time...



## **Empathy** (*Caring, Understanding*)

- Did we listen and show concern for the situation?
- Remember, faculty are real people with feelings and anxieties just like us
- Try to put yourself in their shoes, see their perspective
  - Consider their travel schedule, family pressures, workload, lack of sleep, etc.



## **Tangibles** (*Appearance, Atmosphere*)

- Was the office environment efficient and reassuring?
- Introduce staff members who will participate in the process (even the back ups)
- Project an image of organization
  - Tidy desk, detailed log/spreadsheets, dedicated white board, etc.



Project/Core		Contact Information	Biosketch		Resources	Letters	
Investigator/Role		Email	Sent	Received	Received	LOS	LOI
	John Doe, PI	<a href="mailto:jdoe@northwestern.edu">jdoe@northwestern.edu</a>	1/23/2013	2/1/2013	2/1/2013	n/a	n/a
	MacMurray, Sheila, Co-Inv	<a href="mailto:s-macmurray@northwestern.edu">s-macmurray@northwestern.edu</a>	1/23/2013	pending	n/a	pending	n/a
	Sharma, Ashish, Co-Inv	<a href="mailto:asharma@nmf.org">asharma@nmf.org</a>	1/23/2013	1/25/2013	n/a	pending	n/a
	Kwan, Quiang, Site PI	<a href="mailto:gkwan@bu.edu">gkwan@bu.edu</a>	1/23/2013	1/26/2013	1/27/2013	pending	pending



# Customer Service Rules of Thumb



- Be a good listener
- Identify and anticipate needs
- Make people feel important and appreciated
- Help people understand your systems
- Appreciate the power of YES
- Know how to apologize
- Get regular feedback
- Treat people as you would like them to treat you



## **Be a good listener**

### **Identify and anticipate needs**

- Listen to feedback (complaints, anxieties)
- Produce faculty and staff training/information sessions for new processes or policies
- Understand that change is difficult
- Be an agent for change – help facilitate progress!



# Make people feel important and appreciated

- Staff recognition
  - Institutional award nominations
  - Thank you card/letter/email
  - Lunch/coffee
- Faculty recognition
  - Acknowledge new funding or publications
  - Also media exposure, promotions, etc.



# Help people understand your systems

- Take the time to explain processes
- If you can illustrate why internal routing takes seven days, a PI may understand better why two day's notice on a proposal won't work
- Explain the reasons for the process, i.e., Federal compliance, institutional policy, etc.





# Appreciate the power of YES

- Every now and again, you have to take one for the team
- Work a miracle for someone
  - It WILL come back to you!
- Communicate that you have gone above and beyond
  - Don't whine or brag, but do let them know you went the extra mile

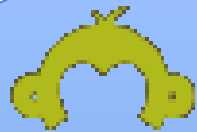


# Know how to apologize

- Make it genuine
- Don't justify your actions
- Make a commitment to change
- Phrase your apology carefully
  - Make it meaningful
- Be prepared for an awkward conclusion
  - Some people accept apologies more graciously than others...



# Get regular feedback



SurveyMonkey®



QuestionPro

Online Research Made Easy™



surveygizmo

FluidSurveys

Online surveys & forms made easy!

PollDaddy



# The Golden Rule:

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*Treat others the way  
You want to be treated.*



# Communication

## **BAD things to say:**

- It's not my job.
- I don't have time.
- I can't do that.
- You'll have to...
- Please call back.
- I don't know.
- You're wrong...
- Really?!
- No.



## **HELPFUL things to say:**

- How may I help you?
- Let me suggest...
- I'd like to ask you...
- It's my pleasure...
- You're welcome...
- I'd be happy to...
- Thank you...
- Please...
- Yes.



# What if someone is upset?

- **Project calmness**
  - Move and speak slowly, quietly and confidently
- **Be an empathetic listener**
  - Encourage the person to talk and listen patiently
- **Focus your attention on the other person**
  - Let them know you are interested in what they have to say
- **Acknowledge the person's feelings**
  - Indicate that you can see he or she is upset
- **Be reassuring and point out choices**
  - Break big problems into smaller, more manageable problems
- **Accept criticism in a positive way**
  - When a complaint might be true, use statements like “You’re probably right” or “It was my fault”
  - If the criticism seems unwarranted, ask clarifying questions
- **Ask for recommendations**
  - Repeat back to them what you feel they are requesting of you



# Be a Leader

- Remain calm even in the most stressful of circumstances for colleagues have a tendency to adopt the attitude of their peers
- Be courteous and respectful of all inquiries
- Treat all inquiries the same regardless of the investigator, the sponsor, or the dollar amount in question
- Review workload often to ensure that customer service is not being sacrificed
- Always maintain a positive attitude toward work
- Advocate for additional resources when needed
- Try to be as transparent as possible when working with faculty, staff, and sponsors



# Metrics for Good Customer Service

- The **SERVICE** provided
  - *Did you get the job done?*
- The **Person or Team** that delivered it
  - *Did you handle yourself professionally?*
- The **Process**
  - *Was your process efficient and effective?*
- The **Atmosphere and Methods**
  - *Was the Atmosphere conducive? Were the Methods sound?*
- The **Confidence & Reassurance** customers felt
  - *Did your customer feel taken care of and at ease?*





# Discussion

