

DIRECTIONS

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Pacman Team Achieves Real Results

(Payables Administration Can Make Adjustments Now) Pacman Team, Payables Administration

Some of you may have heard of the “manual process” in Payables Administration but may not know what it is. Manual payments for which purchase orders are created, are most often for individuals who do not produce invoices or for vendors with foreign addresses. This article describes the rapid improvement workshop and the results achieved by the Pacman Team to pay these invoices faster.

Last year a team consisting of Payables Administration supervisors and the Tax Desk got together to review the manual invoice process. Their task was to outline the manual process, discover areas in need of improvement and create teams to find solutions. Out of that team came a recommendation for creating improvements to the process.

Kate Riley presented the “rapid process improvement” (rpi) method to Financial Management and gave Payables Administra-

tion the opportunity to test the theory in practice with the manual process. The goal of the rpi team was to reduce duplication of effort and to shorten processing time in Payables Administration. In the past, teams got together once a week for an hour or two and could take a year or more to do their problem solving. This new problem solving process takes less than a single week.

As this had never been done at the University before, there was some excitement, trepidation and skepticism about this process. However, we had nothing to lose but a little time.

Before the team met, Kate Riley, Cindy Gregovich, and Pramilla Chand reviewed the full process, asked a number of questions of all workers involved with that process and clarified a number of points. This information was crucial for the leaders to help the team understand the whole process. The leaders also needed to narrow down the area of concentration and to assure that results would be seen in a week.

The team met the week of October 23, 2000. At the end of each day a report was given to the Management Oversight Team on our progress and feedback was given. A report was sent out daily to the Financial Services staff on our progress.

Overview of the Workshop

What we got done in one week

On day one the team learned new techniques to use towards process improvement including exercises and simulations to stimulate our creative juices. We also did a



Left to right:

Rear, Carolyn Adams, Randi Adair, Sue Vadman, Kate Riley
Front, Pramilla Chand, Cindy Gregovich, Mei Wu, Mary Girgis, Cora Buenafe

QUIPS

Quality Improvement
Program Shorts

An update on the
Quality Improvement Program
from the
Senior Quality Improvement Specialist,
Kate Riley



The EIT: Strategic Planning—The Next Steps

One of the four major strategic initiatives for Financial Management, managing by data, is taking shape. The EIT retreat in October 2000 resulted in a new tool for us to monitor our processes. This tool, the Performance Dashboard, displays the results of our ten key processes against a target goal. Gaps between current performance and where we want to be stand out clearly.

After the retreat, the EIT continued the work of aligning the strategic initiatives with the results of the Performance Dashboard. We know that our strategic direction will be focused on more web-based solutions and consultative-type positions. We also know that we're not meeting our targets in many of our key processes. At the December EIT meeting, the question for the EIT was: where should we focus—what processes were important to work on immediately. After a thorough evaluation of data, trends and current realities, a consensus has emerged. The EIT has identified these three processes as immediate priorities: developing staff; paying bills and managing financial information. You will be seeing increased attention and focus in these areas in 2001. Be ready to

lend a hand if you're asked to be on a team. We will all need to work together to make change.

Training

The Process Improvement workshop will be Thursday and Friday, April 26th and 27th.

The Spin & Marty BBQ House has closed its doors. The trainers, Peggy Fitzwater, Ginny Montgomery and myself have developed a new case study and added more interactive training. The class is open to teams and individuals who want to learn process improvement methods. Call Rae Ann Laubenstein (616-9471) to enroll. Try it, we think you'll like it.

Financial Management Employee Survey

A team of FM staff has started planning the latest employee survey. For this survey, we will be working with an external market research company that specializes in employee surveying. Look for more details about the survey in February 2001.

QI Tool

A good habit for on-going teams to form is evaluating each meeting. Members can praise what they liked and pinpoint what they didn't. Many teams in FM use the +/+ method of evaluating. For a slightly more structured evaluation, try this format at your next meeting.

Team Evaluation Form

Our meeting today was:

Focused	1	2	3	4	Rambling
Productive	1	2	3	4	A waste

The pace was:

Too fast	Just Right	Too slow
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Everyone got a change to participate:

Yes	Somewhat	No
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Our purpose was:

Clear	1	2	3	4	Confused
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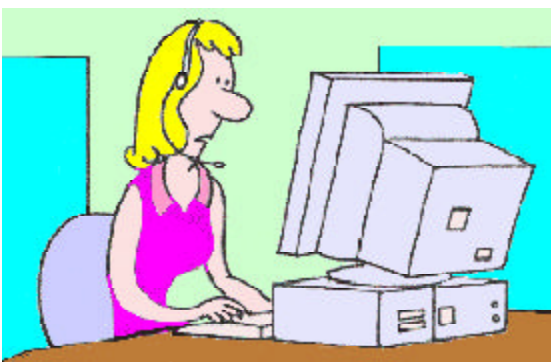
We made good progress on our plan:

Yes	Somewhat	No
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At our next meeting we should:

Do more of: _____

Do less of: _____



"Oh, You're obviously still angry. Please hold while I play another five minutes of soothing music to calm you down."

Pacman (cont'd)

walk through of the manual process (both first and second floor) and then flowcharted the current process.

The second day started with a review and recap of the work done the day before, and then the fun began. Brainstorming started with the process, process stabilization and streamlining. Then bottlenecks were identified, measurements were discussed, and a vision was developed. We began to identify implementation projects for the new process. Finally the team members began preparing for a presentation to the Financial Services staff.

On the morning of day three we finished our preparations and made a report to Financial Services. Feedback was requested and received from the staff. The team resumed meeting to integrate comments from the feedback into our work efforts. The remainder of the day was spent working on the process.

Day four consisted of more work on the process. There was a meeting with Claudia Christensen of the Purchasing department to work on communications between the departments to help streamline interactions. We discussed with C&C setting up of a group e-mail box, access to Requisition and Document logging screens and other PAS related subjects. There were also meetings with Wayne Teeias, (Processing Supervisor), and Yee Lam, (Administrative Services Supervisor), relating to Document Logging, mail and other related issues.

Day five brought us face to face with the finish. Final reports were prepared and a formal presentation was made to all of Financial Management at Gerberding Hall. Four and a half grueling days ended with the team satisfied, exhausted and looking forward to the implementation of our plan.

After the Workshop

The new Manual Process Team starts work

There were some worries about the work that hadn't gotten done during the week.

But, just as when one goes on vacation, some work gets done and some waits. With the assistance of peers in our organization, a minimum of work was left undone. The following week spirits were high as the new Manual Process Team was created and set in place.

A new kid on the block, Marion Uemura, had worked for a short time in the area as a temp and had been recently hired as a permanent employee became the fifth member of the new Manual Process team. In addition to Marion, the team consisted of Sue, Cora, Randi and Carolyn. Sue and Carolyn moved downstairs to be with the others in order to group the team in one location.

There was a lot of stress and confusion during the first couple of weeks. There also seemed to be some frustration as well. The transition was not going as smoothly as anticipated. There were a number of training issues as each

member of the team had to deal with areas completely new to her. Everyone had something new to learn. Mary Brokaw, supervisor of the actual process, needed training, had her own work to do and also had to cover one and one-half empty positions. So, to assist the team and the supervisor, Cathy Sleipnes was assigned as temporary supervisor. Cathy's task was to help the team through a difficult transition, smooth ruffled

PacmanTeam

Pramilla Chand, leader

Randi Adair

Carolyn Adams

Cora Buenafe

Mary Girgis

Sue Vadman

Mei Wu

Management Oversight Team

Ann Anderson, sponsor

Mary Brokaw

Norma Knutson

CeCe Redila

Julius Rullan

Wayne Teeias

Yee Lam

Workshop Facilitators

Cindy Gregovich

Kate Riley

Workshop Consultants

Claudia Christensen, Purchasing

Mike Lesh, Computing & Communications

Bill Tolbert, Financial Services

Pacman (cont'd)

feathers, be a liaison between the team and other areas and work with the team to keep them focused on their new jobs and make sure they all understood and followed the proper procedures.

One of the other tasks Cathy assisted the team with was writing procedures. To better understand the process and to ensure everyone was “on the same page,” regular meetings were arranged for the team to get together to review the procedures and refine them. This is a work in progress. This task has given the team the opportunity to compare notes and has helped ensure that they handle the process the same way.

This is an ongoing, dynamic team. As expertise is gained, new processes are introduced to aid the overall work of getting checks to the appropriate people accurately

and in the shortest period of time. Taking a task that was traditionally split between two units and reassigning it to one, sped up the process. The results have been tremendous. The team’s goal was to go from a turnaround of twelve or more days to a turnaround of six days. The goal is in sight. In addition,

customer Service reports fewer calls regarding late or missing payments.

Rapid Process Improvement

Our opinion of rpi

The rpi method worked well in this instance. The most difficult part was the transition period. The team was expecting to just sit down and immediately see results. We were not prepared for the distractions,

frustrations and misunderstandings which occur during the on-the-job training period that is necessary to bring everyone up to the same technical level in every step of the process. Kate Riley assured us that this is normal. Any group that participates in this method should be aware that this is often the result of this method and they need to prepare for it.

With patience and understanding, we made it through that difficult first month to become a strong and cohesive team with common goals and experiences. The team members continue to learn from each other and make decisions to help make the team better. Each person is available to perform customer service in making payments through the Manual Process. We highly recommend this method as another tool for our problem solving team.

Training Schedule

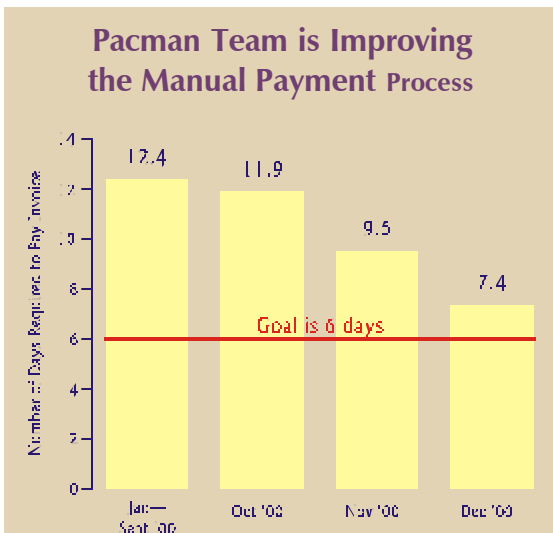
Training Schedule for February & March 2001

Class: *EDP Workshop*
Date: 3/14 & 3/28 (2 sessions)
Time: 12:30 – 4:00
Location: 142 Gerberding

Class: *Process Improvement Workshop*
Date: 4/26 & 4/27 (2 sessions)
Time: 8:30 – 4:00
Location: 134 Lander

Class: *MBTI Feedback Session*
Date: 2/28
Time: 10:30 – 12:00
Location: 142 Gerberding

Contact Rae Ann Laubenstein (6-9471, raeannl@u.washington.edu) to register



RECOGNITION REVIEW



The Year 2000

Looking back over the past year and the Recognition Review section of Directions highlights the fact that recognition is alive and thriving in Financial Management. We sent out thank you cards and got to know each other at the Person to Person Breakfasts. A magician entertained us while we enjoyed ourselves at an ice cream social. We requested Expresses and kept the RQT busy interviewing on nominations and planning the resulting celebrations. The RATT (Recognition Awareness Training Team) visited each office to share a presentation on formal and informal recognition.

The RQT surprised staff with food balloons and music for Recognition Expresses in: Public Relations Unit of Student Loans & Receivables

- Treasury
- Payables Administration
- SOS Team in Grant & Contract Accounting
- Student Fiscal Services including Student Loans & Receivables and Student Accounts
- Administration Service FAS Control Unit in Payables Administration
- Management Accounting and Analysis
- The Web Team in Grant & Contract Accounting
- Payroll

The QSTEP was a popular award with 9 of them being presented to staff members exhibiting behaviors in one or more of the qualities of Trustworthy, Trusting of Others, Collaborative and Committed. The awardees included:

- Sue Vadman for Trusting of Others;
- Teresa Crisostomo for Collaborative and Committed;
- Shawna Litterski for Collaborative;
- Jocelyn Bautista for Trustworthy;
- Leo Aguilin for Collaborative;
- LiChang Wong for Committed;
- Lindsay Hendrix for Collaborative;
- Tess Domingo for Committed;
- RaeAnn Laubenstein for Trustworthy and Committed.

Two TOPS awards were given. Nate Findley in Equipment Inventory was recognized for developing a method to reduce pending assets. Carole Breeden, Tahalita Kia and Shawna Litterski in Payroll were recognized for improving the Overpayment Process.

A LINQ Award was given to V'ella Warren for all four leadership qualities including Trustworthy, Trusting of Others, Approachable and Inspiring. Diane Cooley was recognized with a LINQ for the quality of Approachable.

The RQT is looking forward to another exciting year of recognition activities, so keep those nominations coming.

When Process Partners Have a Good Idea

Karen Long, Grant & Contract Accounting

The New Accounts section in GCA sets up gift accounts in FAS based on a memo from our process partner, the Gift Policy Department. In the past, we notified Gift Policy about the budget number by mail, and it could then take up to three weeks before the funds showed up in FAS for the recipient department to spend.

Nancy Gwin, Liz Bergstraesser and Nanci Modolo, from UW Gift Policy, asked to meet with the staff in New Accounts to talk about ways we could improve our joint process. They had identified the processes that slowed account deposit on their end—they needed to deposit gift checks right away and didn't have the new budget number, so checks were deposited to a suspense account. When they received notification of the budget number, a journal voucher was required to move the funds to the new gift budget.

Our process partners wanted to take advantage of available technology including fax and e-mail. They suggested that they could

fax (rather than mail) a copy of their memo to GCA, and then New Accounts could notify Gift Policy of the budget number the same day, by e-mail. Gift checks could then be deposited directly into the new budget. This would save preparation of journal vouchers and a significant amount of processing time. We agreed to the idea with a few adjustments, and then tried a pilot period. It worked great! Our customers, the departments, had gift funds available within three days rather than three weeks.

In Financial Management we've put considerable creativity over the years into improving our own processes, but it's been more difficult to work with shared processes. So when process partners have good ideas, we can leverage our influence by working collaboratively to implement changes whenever we can. It's the thin edge of the wedge—once a good idea (like process improvement) is out there, it's contagious!



Salary Cap Addendum Streamlined

Suzette Ashby, Management Accounting and Analysis

Completion of the Salary Cap Addendum had become an onerous chore for departments. The National Institutes of Health and the Substance Abuse and Mental Health Administration require a limit on direct salary a faculty member can receive on an applicable grant or contract. Cost sharing is required when faculty exceed the salary cap(s).

The Salary Cap Addendum is a worksheet which enables faculty to calculate the amount of cost share owed for each NIH budget on which they are paid. Calculations became more complicated recently when NIH added multiple caps, each depending on the start date of the grant and/or contract. A final report was generated at the end of each federal fiscal year to determine compliance with the salary cap.

Management Accounting and Analysis (MAA) and Grant and Contract Accounting worked together to improve this time-consuming manual process. A team was formed comprised of Suzette Ashby, Ben Gines, Mary Jo Hershly, Supremo Manabat, Brion Norton, and Sam Senturia.

The final product was an automated addendum which determined the salary cap and the minimum amount of cost sharing required. Automation of this addendum saves both departments and MAA approximately 20 days of work per year. In addition, the final end of year report was also automated, reducing the amount of time required to produce the report from over three months to just four days.



KUDOS

Compiled by Diane Cooley, Student Accounts,
from e-mails & notes received by FM staff



Yoshie Pearce: I wanted to thank you for all of your help in recent weeks in getting our backed up invoices paid. I really appreciate your extra effort to help us out of this situation. You've been terrific! thanks!!!! *David Carr, Manager, Motor Pool Operations*

Pramilla Chand and Heidi Gustafson: For over 5 years I have been working with VWR and Accounts Payable to obtain a credit for a piece of equipment. Pramilla was able to figure out the problem by talking with Heidi. Together they worked out the problem. I can't say enough of the persistence and help Pramilla has given me in resolving this issue as well as in the past. *Sandra Moore, Biological Structure*

Donna Andreason, Kristie Dunne and Shawn Williams: I would "officially" like to extend my appreciation for exceptional performance in assisting me with invoicing issues this year. They continually provide me with professional, friendly and timely service even in difficult situations. I appreciate their working knowledge and their willingness to "drop everything" to handle an invoice problem which I needed to resolve quickly. In addition, I would like to extend my appreciation to **Pramilla Chand** who has provided exemplary client service to me this year. I appreciate her willingness to resolve the many invoicing problems this year that required immediate action. *DeAnn Wells, Purchasing Department*

Donna Andreason: I believe in the importance of giving staff proper recognition for doing an excellent job. Your Customer Service team has done an outstanding job of assisting me not only resolving, but expedited payments for several problematic invoices. I

greatly appreciate the work Donna, and the rest of the AP staff are doing. *Raymond Hsu, UW Purchasing/Housing & Food Services*

Pramilla Chand: Thank you very much for staying late on Friday to be sure that the payment for Quadramed Corp would be cleared and scheduled for payment. My thanks to you for a job very well done. *Kerry L. Kahl, Purchasing and Stores*

Thanh Nguyen: Thank you for your prompt, courteous and efficient service. I have been very favorably impressed with the quality of the service that I've received from AP the last two times that I've had to resolve payment problems. *Jesse Keith, UWMC Clinical Engineering*

Donna Andreason: Please be advised that Donna has great customer service skills. *Spectrum Laboratory Products*

Lisa Scheyer: How can I thank you enough for all that work you did? This is exactly what I was looking for. You were very helpful and friendly. You did a wonderful job. And I want to thank you. *John Rajan, Department of Pediatrics*

Shawn Williams: Shawn has presented a professional, congenial and pleasant disposition. She doesn't mind taking the extra time to teach me how the process works, answering questions, helping to clear up confusion and/or errors regardless where they occur in the process. Payables Administration has a good person and employee. *Kris Burleigh, UW - Cardiology*

Bill Tolbert: A potentially politically explosive situation was unravelling with our department about a reimbursement that the payee felt was late in coming. Bill took care of the matter in record time. This was not

Lisa Scheyer:

How can I thank you enough for all that work you did? This is exactly what I was looking for.

*John Rajan,
Department of
Pediatrics*

Kudos (cont'd)

just an ordinary reimbursement, because it had to be a check in foreign currency to a foreign vendor. He coordinated everything so impeccably that within 48 hours we had a check. Also, **Sue Vadman** called me and explained extensively the situation and helped me word an answer to the angered payee. My congratulations to your department, Bill Tolbert, Sue Vadman and **Randi Adair**. *Kia Kornas, Dean of Medicine*

Pamela Rogers, Lolita Hidalgo, Olivia Watler: Thank you all for your help in this matter!!! I do appreciate the great team work you have over there! Great expedient service to this matter!! *Rose Rulloda, Pediatrics Administration Office*

Kerry's and Ann's teams: Kudos for their effectiveness in receiving kudos from the auditors. Nice work! *Weldon Ihrig*

Heidi Gustafson: She has a wonderful dedication to her job that you hardly see these days. She is also a great speaker and easy to listen too. *Barbara Fulton*

Student Fiscal Services: I signed up for the direct deposit and LOVE it! I have also appreciated being able to check on my financial aid status and tuition statement. It is very convenient. *mfrazee@u.washington.edu*

Frannie Gladney: Thank you so much. I cannot thank you enough. *Kevin M. Hall, student*

LiChang Wong and Combined Fund Drive Team: WOW! Congratulations on such a great event!!!! You continue to surpass expectations year after year. I must admit that I sent the web site address to my superiors and they were all thrilled by your ambition and sense of innovation. I want to give a special thanks to Michael Fero for all the work he did to make the web site a success. You know, it is accounts like your that make this job so much fun. Thank you on behalf of the CFD and all 1600 charities it represents. *Chris Cooper* **CFD Celebration Party Day:** Excellent outcome and performance by your

entire team. Great example of paying forward to assist other less fortunate. *Weldon Ihrig*

Mark Landis: You have made this Christmas the best Christmas I have ever had. I thank you from the bottom of my heart. You are the best because you didn't have to do this for just one student but you did. I will be forever thankful for your concern on my loan. *Esther Kim*

Student Fiscal Services: I am a graduate of the 2001 UWT class, I was a returning "older" student who after two long careers chose to get the degree I always. My experience with the fiscal student services was great. Many times you needed to have Tacoma check with Seattle to answer your question, but most times answers came in a timely manner. I never had a problem with money being transferred into my account - a nice plus after the CC experience. On graduating all the loan papers came out in a timely manner. *Kathryn Held*

Student Accounts: Thanks for this GREAT letter. Never have I seen such a clear and helpful document about TA/RA/GSA's and tuition. Stars in your crown!! *MaryEllen Anderson, Art History Student*

Lindsay Hendrix: A student gave her a beautiful vase of fresh flowers to thank her for helping the student with some questions.

Shawna Litterski: She was extremely knowledgeable and very helpful to me this morning. I wanted to let you know that I appreciate the help. *Lisa A. Ricci, Children's University Medical Group*

Ginny Montgomery: Not only was she a big help to me but she was also very efficient and productive on how she did the job. I could not have done it without her. *Mila Sarmiento, Ocean Payroll*

Joni McDonald has been a real trooper making the service center a "go." She's been the constant presence throughout. *Patricia Woehrlin, USER Project*

Mike Winans: I would like to thank you for all of your help yesterday. I know that our department had a huge number of hand



*Judy Wilson
and her team:*

If there was a university special service orientation award you and your staff would be the Evans School nominees.

*Marc Lindenberg,
Evans School of
Public Affairs*

Planning for Career Growth

Sam Senturia, *Management Accounting & Analysis*

Writing your EDP is an important step toward defining your career goals. I found out shortly after starting my job here that Financial Management (FM) will pay for and provide time for my career growth. The “only” thing required of me was an EDP. Fortunately, FM offers a two-day workshop in writing and developing a plan. The focus of the workshop is you. The in-class and at-home exercises center around developing your own EDP. By the time I completed the workshop, I had a fairly good draft of my EDP and I was also able to discover some of the things that motivate me and some of the goals and values that I have for my career.

After completing the workshop, I refined my EDP and expanded it. I have what I call a working draft that I make changes to periodically. Now, I have a list of all of the Training and Development classes as well as work-

shops from Computer Training that are needed to help me accomplish my plan. I refer to this list each quarter and take two or three classes that will help me attain the goals I’ve outlined. In addition to this, I have found means other than course work to attain my goals. The key to this is being aware of opportunities as they present themselves so as to take advantage of them.

Of course, all of this is not possible without the continuing support of my supervisor, Jane Wiseman, and her supervisor, Sue Camber. Jane requires an EDP for each employee in our office and is always available to read and review mine.

The first step in this process is the EDP workshop. After that, the process is in your hands. It is not only nice to think about what you will be doing in five years, but to do something that will help you get there.

It is not only nice to think about what you will be doing in five years, but to do something that will help you get there.

Praise for a New Level of Customer Service

Donna Andreason, Kristie Dunne, and Shawn Williams, *Payables Administration*

The Customer Inquiry Unit in Payables Administration has received several letters of praise recently. This team, consisting of Donna Andreason, Kristie Dunne, and Shawn Williams, attributes our focus on customer service to the leadership of Pramilla Chand and to the principles we learned in the Financial Management Quality Improvement seminar. Pramilla has allowed us the freedom to work as a self-managed team. As a result, we are free to meet individually and see what works and what can use improvement. Implementation of new ideas in this small, self-managed team is instantaneous.

Previously, calls to Accounts Payable were a source of frustration. We had a rotating staff that answered phones as well as their own

assigned tasks for the day. Now, we have three full-time program coordinators who take ownership of the situation and try to see things through to the end. We feel it is important to build a rapport with the caller and leave the person feeling taken care of in an expedient manner. While we want to do as much as we can for our callers, we also strive to teach them to explore on their own and fend for themselves in the future.

This sense of customer service also extends towards each other on our team. Our aim is to share information, to show consideration towards each other, to see problems as challenges and to maintain a positive, professional work ethic. The compliments give us a sense of satisfaction. Complaints will come as

See the Kudos section for what customers are saying!

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Financial Management Triumphs Again!

The CFD Team

Once again, Financial Management is the University department with the highest level of participation in the Combined Fund Drive. This remarkable achievement is due in no small part to the unstinting efforts of the 2000 Combined Fund Drive Representatives: Cathy Billings, *Treasury Office*, Nabil Girgis, *Bank Reconciliation*, Brenda Grayson, *Grant & Contract Accounting*, Penny Halverson, *Payables Administration*, Lindsay Hendrix, *Student Accounts*, Michael Horner, *Equipment Inventory*, Shawna Litterski, *Payroll*, Karem Martinez, *Financial Services*, Ginny Montgomery, *Payroll*, Ghan Sachdeva, *Student Loans & Receivables*, Lisa Scheyer, *Payables Administration*, Vazul Szakacs, *Payables*



Administration, Li-Chang Wong, *Student Accounts*. Our total giving is more than \$25,000 and a whopping 95% of us gave something to our community this year. Our ability to have fun and come together as a team—not to mention the caring and generosity each of us has shown—say a lot about why Financial Management is such a great place to work. Rumor has it that Intercollegiate Athletics, whose participation rate was 86% this year, has us in their sights and hopes to knock us off our perch next year. The Financial Management team will never let this happen, of course, and we can't wait to see their jaws drop when we hit an even higher CFD participation next year!

Students Take to Electronic Banking

Ken Haines, Student Accounts

A considerable joint effort by Student Fiscal Services and the Office of Student financial aid to increase student's use of electronic banking has paid off. Students have long had the option of having their Financial Aid deposited directly into their bank account, but participation has lagged. A new and improved version was introduced a little over a year ago...and student participation has boomed. Features include:

- Students sign up on the web instead of filling out and delivering a paper form.
- Under the old system, the balance of aid after tuition is paid would go directly to the student's personal bank account. Same under the new system with an added feature: students not receiving aid can sign up to pay tuition directly from their bank accounts.
- Online viewing of the student's tuition account on MyUW, replacing a telephone call or personal visit.

Among the awareness tactics used by the Student Accounts "PR" Department (they rise to the task when called upon) were:

- Notices in the headline section of the online home page of the UW.
- Selective information mailings by SFS and Financial Aid.
- Global email to all UW students.
- Banners in Schmitz Hall.
- Information cards handed out to anyone coming into Student Accounts or Student Loans along with a personal pep talk which would have made an insurance agent proud.
- More computers placed in the main lobby of Schmitz with posted instructions where we could escort those students converted by the information card and pep talk.
- Publicity in student publications.

Benefits for the students include quicker access to aid funds, less personal time standing in line, and increased fiscal accountability. The change allows Student Accounts staff to spend more time solving student problems, and less time processing routine transactions.



Moments of Truth, Misery & Magic

Shep Hyken, CSP

In 1986 Jan Carlzon, the former president of Scandinavian Airlines wrote a book, *Moments of Truth*. In his book, Carlzon defines the moment of truth in business as this:

“Anytime a customer comes into contact with any aspect of a business, however remote, is an opportunity to form an impression.”

From this simple concept, Jan Carlzon took an airline that was failing and turned it around to be one of the most respected airlines in his industry.

Some examples of moments of truth in Jan Carlzon’s airline business are:

- when you call to make a reservation to take a flight,
- when you arrive at the airport and check your bags curbside,
- when you go inside and pick up your ticket at the ticket counter,
- when you are greeted at the gate,
- when you are taken care of by the flight attendants onboard the aircraft,
- and when you are greeted at your destination.

All of these are main moments of truth, and notice that they are all controlled by people. There are many moments of truth that are not controlled by people, such as advertisements (radio, television, billboards, newspapers, etc.) The emphasis of this article is on the moments of truth that we, as people, have control over. These are the points of contact that our customers and clients have directly with us and our organization.

Mentioned above are a number of the main moments of truth, not just at Jan Carlzon’s airline, but in virtually all commercial airlines. These are the main ones. And, while these may be the most important, there are lots of small ones as well. For example, you might be walking toward your gate at the airport and walk by one of the Scandinavian employees. They look up and smile at you.

Now, that may be a small moment of truth, but it is an important one. It adds to the total experience of the customer.

Disney has taken the small moments of truth to an even higher level. They understand the importance that these small moments of truth have on their customers. They train their cast members (Disney’s term for employees) to acknowledge the guest (Disney’s term for a customer) with a smile or facial expression if within ten feet. If the cast member gets within five feet of the guest, they are to acknowledge them verbally. All of the little moments of truth, combined with the major ones, with the addition of the product or service your organization is selling, add up to the overall level of a customer’s satisfaction.

Jan Carlzon said there are good moments of truth and bad moments of truth. I believe there is a third type — average moments of truth. Average is middle of the road, simply acceptable, but not great. I have a term for the good and bad ones. The bad ones are referred to as Moments of Misery, and the good ones are referred to as Moments of Magic.

Our goal should be to create all great moments of magic, even if they start out to be moments of misery. Sometimes a customer may have a legitimate complaint. We not only need to fix problems and complaints, we also need to give customers a reason to want to come back and continue to do business with us again and again. Even if we fix a problem, it doesn’t mean the customer is coming back. For example, if you own a restaurant, and one of your guest’s meals is over-cooked, don’t simply fix it or take it off of the bill. Consider giving the guest a business card with a note that gives him or her a round of drinks or a free appetizer the next time they come back.

At times these moments of misery may not even be our fault. The customer may just be



Praise (cont'd)

well, but we try to look at them as opportunities for improvement. Stress is inevitable, but we try to share our burdens with each other and support each other as a team.

Pramilla has proven to be an excellent role model. She consistently steps beyond the responsibilities of her job to help and train others, and to allow them to reach new levels. In a customer service capacity, her support is crucial to our success. She listens attentively and understands with the compassion of someone who has been in our shoes and empowers us to be proactive.

As the University steers toward improving customer service, it is important to maintain a positive, calm and professional demeanor. We are, after all, representatives of one of the more prestigious universities in the country.

Banking (cont'd)

See the numbers below to be really impressed.

	Aut '99	Aut '00
Direct deposit of aid transactions	8,648	18,298
Electronic tuition payments	464	1,681
Aid checks picked up in person	14,890	9,689

Among comments received:

“Ruth and her staff have done an outstanding job of creating a new service for our students so that they can get their financial aid using modern banking techniques. The numbers are significant. Great job.” *Weldon Ihrig*

“This is indeed a noteworthy accomplishment, on which Ruth and her colleagues are to be commended, and it certainly results in significant improvements in the delivery of this particularly important service to students. Thanks.” *Ernest R. Morris*

Editors

Diane Cooley
543-8682

dianec@u.washington.edu

Kate Riley
543-8766

kater@u.washington.edu

Design & Production

Michael Fero
543-4058

mfero@u.washington.edu

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Moments (cont'd)

having a terrible day. For example, a customer may be checking into a hotel. This person may have had three flights delayed and he or she is in a very bad mood. It is not the hotel's fault the customer is unhappy due to the airline's delayed flights. But, it is the person who is checking in this irate customer's opportunity to start to turn the customer's mood around. It is an opportunity to take someone else's moment of misery and turn it into the hotel's moment of magic.

So, manage your moments of truth. Seize every one of them, even if they are moments of misery, as opportunities to show how good you and your organization are. This will go a long way in building long term customer loyalty and total customer satisfaction.

Shep Hyken, CSP, is a professional speaker and author specializing in the areas of customer service and customer relations.

Kudos (cont'd)

drawn checks that you processed for us so that all of our employees received their full amounts on payday, due to our data entry error. You went above and beyond the call of duty, and I just wanted to say THANK YOU for all of your efforts. *Deborah Lee, Molecular Biotechnology*

Judy Wilson and her team: I wanted to take a moment to thank you for your unusual, very proactive effort to get our public endowment funds invested while we all figured out the best internal university procedures for creating and managing the fund. If there was a university special service orientation award you and your staff would be the Evans School nominees. *Marc Lindenberg, Evans School of Public Affairs*

Suzette Ashby-Larrabee, Sam Senturia: The report looks great! The report is basically what I had to do by hand when I got your composite list. This will save a LOT of time, not having to go through a dept of medicine list. *Harriet Ortiz, Dept of Medicine*