

AI Edited Rough Transcript

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INTRO: Welcome to Distribution Talk with Jason Bader, the show where we dive into the stories, struggles and solutions from business owners and thought leaders in the wholesale distribution market.

JASON: Hey, friends. Jason here. In this episode, I had the opportunity to catch back up with Martha Brooke of Interaction Metrics. She specializes in really all things **customer and really the metrics of the interaction of you and customer** and taking that away from a personal view of that.

And, you know, hey, did I do a good job? I think I did a good job. I've been doing this long enough. I'm probably pretty darn good with interacting with customers to actually using scientific methodology to score those discussions and giving points, you know, for certain things like, hey, you know, I said the name of the company, I said my name, I asked if I could help or I showed empathy in a conflict. And, you know, really taking that from a just it sounds like a good call to here's some actual measurables that we're going to look at when I listen to these interactions with customers and then taking those what they observed and offering individual coaching and workshop.

Anyway, we'll go through the whole thing during the interview, but it's just kind of fascinating to me that **things that we kind of sometimes take for granted are our customer service, our customer facing individuals. Are they interacting in a way that we would find positive and the customer is appreciative and they're going to continue doing business with us?** You know, these are it's just kind of fascinating to hear how do we observe that, score that, and improve that so that we can **have great long term relationships with these customers** that, you know, really, they're high transactional customers, and we really have to honor that going forward.

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JASON: Well. Hey, Martha, welcome back to Distribution Talk. It's been a little while, and, uh, always a pleasure to hear from you.

MARTHA: Well, thanks, Jason. It's always fun to do this with you.

JASON: Absolutely. Well, if you wouldn't mind, uh, for the audience, could you, uh, kind of give a brief synopsis of your background and how you got into the realm of customer service, and then maybe talk a little bit about customer experience versus customer service and the things that you're doing right now.

MARTHA: Sure, sure, sure. Great. So, gosh, way back in the day, I worked for a large customer service center. So customer loyalty customer service center, which transferred into my next job, which is a very early.com. So we're talking late 90s and it was a company called Food.com and really got some great operations chops out of that. And then worked for a late com called Lucy.com, which turned into consulting work for Nike and Adidas.

And that was where I really saw a hole in the market for serious customer experience. So not just customer service, but **customer experience measurement and improvement**. And so started the company. And then they were early clients of Interaction Metrics. So yeah, Interaction Metrics. My company was founded in 2004. So pre-Facebook and it's been a lot of fun. I have a small staff of co-analysts and we work with mostly B2B companies, but not entirely so companies like Bosch and Yaskawa, California State Bar. In fact, we're doing a findings presentation for them in a couple of hours. So a diversity of clients, but for sure unifies our clients is that they're **really clear that they're serious about the customer experience of which customer service is a part of the customer experience**.

So I think that's how you hopped into this was like, oh, is there what, you know, customer service, customer experience? Because I think some people use them sort of interchangeably and they're not. Customer service is a subset of customer experience. Right.

So customer experience, when the customer thinks about their experience, they're thinking about did you have the right inventory? Did it arrive on time if you didn't have it in stock, were there alternates? What's the quality of your website? What about the portal? That's just for me and my companies, which might be distributors or OEMs. Okay. Well what about customer service. So that's a part of it. But it's not the all of it. Supposing I have to return a product for a

repair warranties. All of that is customer experience. In fact, there's almost nothing about a company that's not customer experience. I would say price maybe I would take out of the customer experience realm.

JASON: Well, I was just going to say that, you know, **really from a physical sense, it's the moment you walk in the door**, you know, as a customer, you know, it's the moment you walk in the door. It's the feeling you get. And again, that might be a brick and mortar, you know, site, but it could also mean virtual as well. How do you feel when you interact with this organization?

MARTHA: Right. Which is the people. But it's also the parking lot. It's also the layout of the goods. It's also did they have interesting things like sometimes you go into target and the shelves are empty and it's just a weird experience.

JASON: It's depressing.

MARTHA: It's depressing. Yes. And it's nothing about the people. They didn't do anything wrong. That's not customer service. It's the back end. It's the operations. It's the supply chain. **And so experience really is that everything that faces the customer.** And then there's the C-suite, which is outside of that, like they're looking at profit and loss and they're looking at price point. **So that's different. But just about everything else about a company really is customer experience, including things that are not your company.** Like, for instance, when it comes to supply chain slash delivery, it's almost impossible to not be thinking of Amazon. I don't care if you're ordering B2B or consumer. You're like, look, Amazon can get this thing to me in two days or sometimes even overnight. Sometimes I'll order something at midnight and it's there at eight in the morning, like so. I'm always and I think everybody is always subconsciously or consciously saying, well, **if Amazon can do it, why can't you do it right? When it comes to the supply chain, the delivery aspect**, you know, when it comes to beautiful, I think you can't help but think, well, you know, **if Apple can package this thing like just it's really nice to open their package.** Why is your package just like with this big plastic mess. And I have to get special scissors to get into the thing. You know what? What is you know so well.

JASON: That all leads to how the perception of that organization.

MARTHA: Right? Which my point is that it's not just shaped by what the organization does, it's also shaped by **surrounding competitor and comparable companies.** And too often it's just like, what do we do? And not looking at what is what is the competition doing so with our clients. I almost always encourage them to be asking questions in the survey or in the

interviews about, tell us about the who's the competition? Well, what do they do? Well, what does XYZ do better or worse? Or, you know, really framing it up in terms of that or if it's customer service, mystery shopping, the competition and really staying abreast of **what is the competition doing with their emails, their chats, their phone calls, because it's part of the experience. It's very rare that a customer is such an undying advocate that they only will buy from you, regardless of whether you have it in stock or not. Or do you know what I mean? The competition is always at play, as are comparable companies.**

JASON: Absolutely, absolutely. So about a year ago or so, and again, I'm not sure on the timing. You can correct me on this. You had a project come about with a distributor. How long did that last? Just out of curiosity, I can't remember.

MARTHA: Yeah, about a year.

JASON: About a year. Okay. Okay. Yeah. So if you wouldn't mind, just kind of share a little bit about this project that you, you jumped into with this, you know, traditional privately held business. What happened? Why did they even want to engage your services? What was the what was the outcome? Please, if you wouldn't mind just sharing a little bit about that.

MARTHA: Yeah, absolutely. Thanks for asking. It was a **project that came about because there was a sense among some of the managers that thought their customer service just wasn't that good.** So I asked them really kind of drilled into like, are you only interested in customer service. Because that's very important because we know that especially with a distributor, they're like we were just kind of riffing on their aspects that about the experience that have nothing to do with customer service. Right. And they were like, no, no, no, no, not interested in anything other than customer service okay. So just customer service. I said, great. We'll start with a survey because your vibe about this is, well, our customer service isn't that good. Let's ask the customers and let's ask the employees like what do they think? Because honestly, if the customers are saying, you know, the customer service is pretty good and the employees are agreeing, everybody's like, well, you know, a few managers think it's not that good if everybody else thinks it's pretty good. Well, you know, done. Yeah.

JASON: Let's not mess around with this. Yeah.

MARTHA: Yeah. Like it's done like and I always say you're never going to get to perfect. But if you're like 90% you're at the point of diminishing returns okay. So we did surveys I think as I recall there were three levels to the survey. There was to the customers. Yeah. And these were the most engaged customers, in other words, that they were buying with some frequency. So

they'd really have something to say about the customer service also to the executives and then also to the front line customer service reps themselves. So three surveys.

JASON: Now a quick question on the customer base. This particular entity, I think multiple states that they they cover you over multiple locations. Did you all survey all these different places or was it primarily concentrated in their headquarters or how did that go about?

MARTHA: So customers among all of the western states.

JASON: Okay, okay. Gotcha. So it was very diversified. You could get a sense of, uh, you know what? People in other states thought about.

MARTHA: right? So yeah. And and do comparative segmented analysis. So for instance, how does Nevada compare with Oregon, how does Oregon compare with California, etc., etc.. Because there's also like, well, supposing we find out, you know, really customer service is pretty good except for this one state, this one set of reps, you know. Then okay, then let's just focus on that. That's going to be a much smaller project. And that's fine with us.

What's really important to us, and it comes from my background, is that this is **data driven**. **Yes. Right. Like it's really it's empirical. It's scientific.** It's not. Oh just somebody feels some particular way that Monday morning, but that we can really prove this. And what we found is that actually the customers agreed with the managers who thought customer service isn't that good. Overall, the rating was something like a 54 on a scale of 0 to 100. Right. So that's in school speak. That's an F grade, right. Like if you brought home. So if you brought that home to Mom and dad, they'd be like, hey, Jason, what's going on here? Are you partying or like step up?

JASON: Yeah, step it up, kid.

MARTHA: Yeah, yeah, yeah, step it up. So okay. And then in terms of the executives, they were, they were very clear. They didn't think what they could overhear of customer service. They didn't think it was good. And the employees felt like, well, yeah, but we're not even trained on customer service.

JASON: Good point. Okay.

MARTHA: Like we don't even know what we're supposed to do. So. Okay, so that sets up the case for F grade executives overhearing it aren't impressed. And employees say, but we don't even know what's expected of us. Now that that's a case for we need some further involvement here. We need a program.

JASON: Okay. Okay.

MARTHA: Okay. So that's how it started. And what we proposed was now let's actually get some documentation. So that's those are the perceptions. Now let's analyze the customer service. Let's analyze what **actually happens in a customer service interaction**. So fortunately our client had recording in place. They didn't have it turned on. But I encouraged them to turn it on.

JASON: Recording in place. You mean through the phone system is that is that.

MARTHA: Yeah. Exactly. You know how they say this call may be recorded?

JASON: Yes. Now. Okay. I'm with you now. Okay.

MARTHA: Yeah. So. Yeah. So so they had that, but they didn't have it turned on. So now it's this call may be. Well I hope it's saying this call may be recorded for training and quality purposes or you know however that that goes. And the reps need to know you know usually they sign something or you know, just know is saying, you know, we understand we're being recorded for for just for training, not for punitive reasons. Just so so we can we can train to customer service. Right? Right. Okay. So then my staff and I listened to a statistically valid sample of those recordings and put together workshops on like, here's what we're. So establishing criteria for what makes for good customer service. Yeah. And then training because it's it's not enough to just okay we're scoring and keeping dashboards but actually holding the workshops and the workshops. It's one of my favorite parts of the entire company and I always lead them. I really love it. And so these were, you know, face to face workshops. I think some of them were zoom based because the reps were, you know, it was too much to fly them in.

JASON: From distance and things like that. Yeah, yeah.

MARTHA: But all of the managers were flown in and there was a presentation on here's what we found out and here's how we're listening. We're going to be listening and evaluating customer service to step up the game on customer service.

JASON: So you're listening to these calls. Yeah. And there's some sort of things you're listening for. What are you listening for. I mean what, what kind of things got him a cool guy score. What got him you know a bad score? I mean **what were the things I mean, what were the things you're listening for?**

MARTHA: Yeah. No, I really hope you're going to go there, Jason, because that's really what I wanted to talk about. Yeah. Because oftentimes with, with customer service, there's this sort of

like, I know it when I see it or these sort of subjective, I like him or I don't like him. And really, it's not scientific and it's not useful. And it really doesn't help customer service reps improve their game. So some of that now for every distributor and every company, the criteria is going to be different. But for all companies there are four dimensions to customer service. Should I describe those four dimensions.

JASON: Sure.

MARTHA: And this this is this is, you know, whether you're a distributor or you're Amazon or Starbucks okay. The four dimensions. The first one is efficiency. Did you value the customer's time.

And then we can get into like what are the elements of that. But did you value the customer's time. Two, information. Did you answer their questions.

In ways that are understandable and proactive. Clear ways okay. Three is connection. Did you sound like you were listening. Right. Did you sound like you were affirming the customer. Like you were pleasant to talk with. Okay. And dimension four is what we call differentiation or pop. Were you different in some way or did you just sound like any call center anywhere? Right. Was there something that was in some way unique about this particular interaction? So again, it's efficiency, you know, valuing time, information, answering questions, connection sounding you know, like you're listening. Yeah. And understanding. And four was there something just a little bit different a little bit special.

JASON: So one of the things you had mentioned was about answering the question, could you go into that a little bit more.

MARTHA: You mean that dimension we call information, right?

JASON: Right. **Like did they actually answer what the customer was asking.**

MARTHA: So for instance, in the project you're talking about, that was worth 50% of the call. And for email it was worth even, you know, 65% of the email interaction, because that's what the customer cares about. They're not calling to cry or share their little story about a party coming up. They're calling because they want to know what's the inventory. If you don't have it in stock, when are you going to bring it in? Can you expedite it okay. What are some alternates? When can you get those alternates? Right. That's the purpose of it. You call Alaska Airlines. It's not to like, you know, talk about your dog.

JASON: Right. I'm having a great day.

MARTHA: Yeah. It's like okay. Is it is it at 8:00 in the morning or 9:00 in the morning? Why are there no tickets showing? Oh, you can open up a ticket. Yeah. It's going to cost me \$100 more. That's fine. You know, you're looking for answers to questions. And so it's typically the most important part of any interaction and how we define that. You know what we mean by proactivity and what we mean by clarity. That entirely depends on the client. Right. And so you know there are exceptions like with Starbucks it's Monday morning. What's the most important part of the interaction. What's efficiency. Did you value my time?

JASON: I mean give me my damn coffee. Yeah yeah.

MARTHA: Yeah. Like if I see a line out down the block. Well obviously I'm going over to Pete's. Like you are not valuing my time. Get more staff. So it depends. And then the information is that you got, like I said, a double latte, a dollop of cream, like you got the order correct. You know that's worth something too. But your very first shot is how long is that wait going to be. So sometimes that's the most important. And all of these things depend and require very precise criteria. But just in general the most important part is did you answer the freaking question? And did you answer it in a way that I understand? No internal lingo and giving me alternates when need be and giving me next steps like not just, well, it will be at will call. Like when will it be at will call in an hour in ten minutes tomorrow. Like, you know really seeing the entire answer through leaving. Sometimes we use the expression leaving no stone unturned.

JASON: Gotcha. Okay. That makes a lot of sense. You know, I can see that being a very big part of that scoring method. Yeah. What would a greeting fall in? You know what dimension there. So, you know, thanks for calling the distribution team. Uh, this is Jason. Where would a greeting fall into those different dimensions?

MARTHA: Usually that's a part of connection. So it's like right away. Do you sound like I want to talk to you? Do you, do you say hi? This is distribution. Yeah. Or. Hi. This is Martha with distribution team. How may I help? Yeah. You know, like and well that's a tiny part of the interaction. It does set the stage for everything that happens. Yeah, right. Like because if you're like, hi, this is how the customer feels like now they need to rush. Yeah. Like they're kind of impeding on you. Like, you know, like you're a pretty busy person and they better talk quickly. And maybe they forget one of the items they meant to order. It's a small part, but it does set the stage. Does this person sound like they're listening and affirming? Like they like their job?

So that's a question just as a little tangent that I often ask when I'm just out and about in stores or whatever coffee shop lines or you know, do you like your job. And it's really interesting.

Yeah. Right. Because that's like kind of a it just tells me is this company invested in customer service because if they're like, no, that tells me that there's not a lot of investment in the rep. So anyway, it's just kind of an aside, but it's like this idea of you can tell right away from the pacing and the tone and the words they use, how connected they are. And do they appear to enjoy their job. Right. And it sets the stage for what's going to happen over the course of the next 2 minutes or 10 minutes.

JASON: Got it. So again, **I'm really fascinated with the whole scoring of that phone call.** Sure. You know, do you get points for saying your name? Do you get points for, uh, how did that work? Just in a simple in a simple way.

MARTHA: With that, it's more like, subtractive points. Okay. Because we assume that you're going to say your name, you're going to say thank you. You're going to say the company's name. And if you don't, that's called the distant, what we call a distancing cue.

But it's so assumed that you're going to do it that we on most projects we put that under distancing cues, kind of like if you interrupt or profanity or overfamiliar expression, all of that's under that category of distancing cues. I guess I should say there are five dimensions. So there's the efficiency time and connection differentiation. And then **there's this bucket of distancing cues** which spans all, you know, it can span everything. So an example of a connection would be using their name, Jason.

At some point in the conversation. And not just like reading back. So what's your address? Oh, that's Jason Vader at one. 23 Greene Street. Not like that. That doesn't count. Right. It's at some point, Jason using their name. Yes. It's always nice to use it once. And it depends on the project. Like we have projects where phone calls are really long. If we're talking 20 minutes, you know, do you use it 2 or 3 times? Sure. And it depends on the project where it's used. Sometimes it's the beginning. We have a client right now where we're doing customer service evaluation, where the where they need to say it in the beginning because the CRM system is queuing. Jason Bader calling in. So the rep is instructed to say, hi, I'm Nancy, welcome Jason or something like that. You know, it's like you know that they they need to use it right away. So there it depends on the project and what kind of systems and technologies they have set up. But in any event, using the name is almost always one of what we call an element or A or a Q, and that falls under the bucket of connection. Okay. Now another example of connection would be what we call listening slash affirming words. So that would be, oh, I am so sorry. That was supposed to arrive this afternoon. Yeah. You're going to make sure it gets there this afternoon.

But starting with I am so sorry that happened. I am so not like. Oh, okay. We'll be sure to get it out tomorrow. Right. Like, where's the. I'm sorry.

JASON: Right. Where's the empathy? Where's that? Hey, I know this is a really we've put you in a very bad position.

MARTHA: Right. Exactly. And acknowledging that and likewise, if somebody's placing an order, you know, you don't have to sound over the top with it, but just like, great. Oh, good. We have that in stock. Did you need 2 or 4? And just like throughout a conversation generally we're looking for affirming or listening words 2 to 3 times. Again it depends on the client. It depends on the average length of interaction. But those are words that and it's not about tone. Like you can sound all warm and fuzzy, but if you're not saying I'm sorry when and I'm sorry is needed or I understand or that sounds difficult or likewise terrific when it is a good thing, or awesome if you're young and that and it's a good thing, you know. So the the range of these affirming listening words depends a little bit on who the reps are, because they never should talk out of their it never should sound unnatural. So we do a lot in the workshops about finding what's the natural, what are natural words for you. Because if they're the words I would use, they're probably not going to use them, right? You know, or vice versa. But also what are the words that are correct for the client. So there's that, you know, kind of blending. So that's a little bit what connection is generally about efficiency. It can be about many things. But one of the most obvious this is always a factor in valuing their time is you know, how you need to sometimes put the the customer on hold, right? Right. Yeah.

JASON: Not a good not a good thing. You don't. Yeah. That's not, not good on the other side. So there's got to be a way to do it.

MARTHA: So you have to ameliorate it. Right. Like and almost all of our scoring protocol we take off points and again depends on the client how many. But you know in general it's ten. Sometimes it's 20 points. If the rep doesn't clearly say, I need to put you on hold to do something. And the hold will be approximately x long and usually overestimate that. Like if you think it's going to be 30s, say it's going to be about a minute.

Yeah. And so and why you're doing it and not just let me put you on hold for a minute. It's like, let me put you on hold. I need to check inventory. Right. It will be about a minute. Like that's a complete statement. If you do half of it you get half points. Because there are two parts. It's why you're doing it. How long it will be. All too often without our workshops we just hear, you know the rep talking to themselves, whistling to themselves while they look things up. And then you hear the customer, you know, the customer. Yeah. You know we get it in the file,

right? Saying or in the old school on tape, **you'll hear the customer saying, are you there?**

JASON: Yeah. Are you still there? Crazy right?

MARTHA: Are you still there? Right. And so we know from how the customer is cueing not just our research, but how customers are cueing universally. They appreciate why they're being put on hold and how long it's going to take. Right.

JASON: Oh, I think back to some of the interactions I've had, you know, with, oh, a cable company or, you know, internet company or a bank or something like that. In many cases, I do hear a lot of the things that you're talking about that someone has taught them to, you know, express the length of time that they'll be gone and the purpose for their leaving. So it is making sense as I start thinking back about some interactions.

MARTHA: Right, right. It would be interesting to know whether that cable company is scoring the calls, because scoring always objective. Scoring always improves performance. It's just human nature. If you know you're getting a score from an objective third party, you're incentivized to do better, especially if that's then followed up with some kind of material incentive. Right? There are clear paths toward better customer service, right? Like a material incentive. We have a client that does Amazon gift cards. Yeah, sometimes it's schwag from the company. You know, it can be the sneakers or the, you know, whatever. It might be a gift card at the employee gift shop in Portland. It can be Powell's Bookstore. Sure. Right. So, you know, it depends on what those what those, those material incentives are that then align with the third party evaluation. I mean, these are tried and true ways to improve performance. And by the way, for that client that you're. Referring to in the space of about six months, maybe seven months, we improved performance by 50%.

JASON: That's fantastic. Yeah.

MARTHA: So it really is the great spur to performance improvement is being able to score and share what those scores are. Right.

JASON: Yeah. You know it's interesting. So it's my understanding that, you know, some of the uh, the **executive team of that company actually listened to a few of these recordings and, uh, you know, frankly, you know, they were appalled at a couple of them, you know, a couple of poor examples, I'll put it that way. So, um. Yeah. I mean, I think that's the eye opener for an executive team** or, you know, whoever the

champion was, you know, the person that brought you in to evaluate is that, you know, you're going to hear some things that are not always pleasant, you know.

MARTHA: Right. Right. But you know what? I would just kind of doubling down on this point. It's like, okay, great executive team hears it. And they're like, well, but when you see a score attached to it, the score is four or the score is 40 or whatever it is or, or it's a fantastic call and the score is 94 like that. That just helps kind of frame it up, because this is something we do for so many different companies. And so to have that, **like here's this objective number that's attached to that event is incredibly helpful.** Like it's **not just bad, it's a 44 on a scale of 0 to 100.** Yes. That does that make sense. So absolutely. And again it just lines everybody up.

JASON: And I think again once you are getting the true scoring, you and you actually have backup data, you know, and you have recordings and you have things like this that I guess my question is, **I know you did workshops and you did some individual coaching. What was the reaction? You know, what did the individuals who, you know, basically were caught with a poor score, you know, how did they react to this type of education scrutiny?** I don't know, how would you put it.

MARTHA: Yeah, in general, it was it was very, very positive. Um, that especially and this was kind of toward the end of the project, we did and this wasn't me. This was one of my associate analysts did one on one coaching, okay. Zoom based coaching. And that was really, really well received. Good in part because of her background. She's had a background doing tutoring. And so it really like she really knew how to do these role plays and one on ones. And by this time we had amassed so much data for most of them, it was a really feel good. Yeah, kind of a warm and fuzzy that they were getting that kind of attention. I would guess in, in general there was this sort of like, oh, we matter. We're being invested in.

JASON: That's a great point. Yeah, absolutely. I mean because it wasn't all negative. Yeah. It wasn't all it was like, oh these these folks actually are going to train us this time rather than just expect us to, you know, be rock star customer service people.

MARTHA: Right when we don't know. And we said that on the survey. We don't know. So the workshops with ten people, I think that's really productive and especially with the role play, like I insist on role play, but then on the one on ones, I think that was also well received. So I guess where I'd go with that is it's a multi-pronged, multi-layered approach, like you have to have the big workshops, you can't one on one everything, sure. But then people are really

suffering with how do I do this? Then you go in with one on one coaching. So the larger workshops and also, you know, meetings with the management team to let them know what's going on and recommendations and what we see. And sometimes what we're seeing is, you know, it's not the reps in their training, it's the processes that you have. I have to say, Jason, all too often there's "Oh reps are bad." Um, well, actually that's only a third of any customer, maybe half of any customer service event. Yeah, there's always the processes that you have, the CRM systems that you have and the policies that you have that lie underneath that performance. If you don't have good software, uh, the reps can cover up for some of it, but not all of it.

JASON: Right. No, it makes it makes a lot of sense, you know, thinking about, uh, the individual coaching and, uh, you know, the **reception of that individual coaching** because I think, you know, and this is going to be a generalization. But, you know, those of us of my vintage, you know, sometimes we're a little stuck in our ways and we don't necessarily love to be corrected. And it may have been difficult, uh, you know, did you all find that maybe even generational side or, uh, that there were folks that really didn't accept this very well?

MARTHA: We find that phrased well. Everybody accepts as well. Actually, I did a workshop just yesterday. Medical practice. So totally, totally different vertical here. Yeah, yeah. So it was the front desk people and it's just anybody who answered the phone basically for this medical practice, because sometimes the front desk people are all busy. And so you'd have somebody from accounting step in. So we had them in this, this zoom coaching as well. And I got an email this morning just you know, that they did a big powwow afterwards and had all these to do's and they were already role playing even some more. And one of them who had really suffered and some of them had been with the company for ten years or more, like was so stuck in their ways. And one of them, who'd been there for ten years, took it upon herself to set up a little cheat sheet. Here's what we need to say to patients who call.

JASON: Almost like a script to work off of.

MARTHA: Yeah, yeah. Just like a little basic algorithm, a few words. Just a reminder, because they don't need to do everything they need to do, right, you know, 80 or 90% to have a huge impact on the patient experience. And so just phrase correctly, like everybody, myself included, my staff included, we all have the opportunity to improve. We all have the opportunity to optimize. And interactions are difficult. They're intrinsically difficult. It's also intrinsically interesting, right, that how do you get the most out of the few minutes or few hours that you

have with a person, right. With another person? And how do you how do you do it in a way, especially if it's very short that they hang up the phone or they close out that email and say, wow, I like them. That's interesting. And it's not something you're born with. It's something that we need to deconstruct and show you the elements of and role play and have fun with until it's not perfect, but it's very, very good.

JASON: Yeah, yeah. So a long ago, did you wrap up this project with this distributor?

MARTHA: I think just a couple of months ago. Okay.

JASON: Okay. Just a couple of months ago. So do you have any sense of how it stuck, you know, the traction? Have they been able to give you any feedback as to the interactions or have improved or they're continuing? I'm sorry. I know they would have improved after post workshop. You know, we're all on a high, but I'm thinking of long term traction.

MARTHA: Right. We don't know. Like that's the problem with projects. **That's why we always encourage clients to do programs, like even if it's a quarterly program, because we don't know. And having objective scientific data is absolutely crucial to knowing how you're doing.** I would guess, like if I'm on the inside staff and I'm tasked with improving people, I'm going to say everybody's improved, right? Like that's human nature. Sure. If that's my job, well, they're everybody's getting a 95, right. Like how could it not be that. So that's the old, uh, we have a client who says, well, Fox watching the henhouse. Yeah. You know. Yeah, yeah. Which is not a good program. And so we always say, like, anything you can do in house that's helpful. Do it. That's like, great. It's never like a one person or one company effort. It's a multi-pronged effort. It involves the reps. It involves managers, involves outside resources. But we would say maybe that's one because I think sometimes a question you ask me is what's the challenge for a project. And I would say for this client, it was getting them to fully buy in to the importance of objective data.

And maybe because they don't have that that ethos, they don't have that spirit behind what they do in everything else, you know? So I don't know how they're doing. I would say, you know, at minimum, like a quarterly program because we had been doing daily scoring. Sure. Yeah. That was the kind of how we in the end, like really got a big ramp up is we were doing daily and weekly feedback. **We had a dashboard and you could filter the dashboard. You know, it was really super cool because we believe in making it everything abundantly clear.** So you could use our dashboard, you could filter it down to location, to reps, to, you know, just the bad calls, just the bad emails. You know, you could really filter it probably realistically 24 different ways. And with some of our clients, I'll go visit them on site

and you'll see that our dashboards up on monitors like throughout the facility, which, you know, it's an ego blast for me for sure.

JASON: Of course.

MARTHA: Of course. You know, because I'm human. But they do it because it's really helpful. It keeps everybody on the same page. Right? So in any event, I don't know how they're doing, but I would encourage them to. You think you know about. Just like I'd encourage any, any client to think about a program; doesn't have to be daily, but where there is always some kind of outside third party view through surveys, through interviews, through call scoring, email scoring, you know, plethora of methods, but so that there is some kind of other vantage point.

JASON: Yeah. I mean, really what I was thinking is like, maybe, shoot, maybe I should just give him a call and just find out what I think. You know, just give him a quick call and take an idea. A little secret shopper there, but, um, no, I think that's important, you know, is to look at it's great that, you know, you invest in this, but then what is your long term plan as well? And, uh, that that's definitely something to consider when you're, when you're embarking on a really a change to your organization. That. All right. Well, how do we maintain traction, you know, how do we make sure this thing is sticking with us?

MARTHA: Right. So change management is a whole discipline. And change management is always called a program. It's never called a project. There's never “and we're done.” We've changed. And that's it because, not to continually invoke human nature, but human nature is to slide back down.

You know, you've got all kinds of human nature forces. Human nature is “we're good.” We're in a good place. Like that's what, you know, any inside manager is going to say if they're if their job is about that, right. If their job is to prove performance, we're good. And meanwhile, that's what this medical practice that I workshopped with yesterday, they require these, you know, quarterly or more frequent workshops, often going over the same material because they know that people just... they love the workshop because without them, people do kind of slip down and we mystery shop them many times over the course of the year and their competition because staff changes, their services change, and people kind of go back to where they were. Was there a movie once? Oh yeah. Yeah, yeah. With, uh, Robert De Niro. And they had some incredible drug and they gave them this drug.

JASON: Yeah, yeah. Uh, it was awakenings.

MARTHA: Awakenings. Right. Well, it's like so they got all awakened. They everybody was great. Everybody's high. Everybody's going to the park and having fun. And then it stopped working and everybody slipped back down. And it's like, um, that's a sort of an exaggeration of human nature, but nevertheless, it's like things can work, you know, you get these exciting workshops and things are and then things slip down if you don't have a corrective in place. And I sometimes think there's maybe not enough discussion about what is the difference, you know, everybody knows sort of the vocabulary difference between a project and a program. But sometimes I think there's not enough, like just sitting and reflecting on what's the difference between a project and a program.

JASON: That's a great point. Yeah. We need to jump into, you know, **how does somebody engage you in a project? Because honestly, this is an extraordinarily common challenge inside of distribution,** I mean obviously of other verticals, but in distribution, and I think you don't see a lot of it, I'll be honest with you. You just don't see a lot of this type of, uh, scrutiny and this type of investment. So how does somebody get a hold of you if they want to, uh, you know, put together a project slash, then eventually program with you.

MARTHA: Right. And it always it almost always starts with a project, which is totally fine. Sure. A few ways. One, you could just **Google on Martha Brooke Portland, Oregon. And LinkedIn is always great. Uh, drop me a message on LinkedIn. And by the way, I do conferences outside of podcasts. I speak at conferences. And sometimes that's a really helpful way for some organizations to get to know our work just a little bit better and see more examples. And just learn more about, like, the principles of customer service or the principles of customer experience.**

JASON: Yeah, yeah. No, absolutely. I mean, that's a great way for people to get exposure to you and. Of course, always we will have, you know, show notes and have ways to get hold of you. And actually people can find you on, on my website on distributionteam.com and distribution talk if they want to find you. So we're going to get you found. Let's put it that way okay. If somebody has an interest we are going to get you found.

MARTHA: Thank you!

JASON: So yeah. Well anyhow you know Martha always a pleasure to catch up with you and see what you are up to. And I thought this was a really kind of an interesting one to dive into because, you know, very, very relevant to the audience space here. So I really appreciate you explaining a lot of the different methodologies and the scientific side of this a little bit more.

MARTHA: Well, thank you. And thank you for being **interested in customer service because it is it's important we're all affected by it. Every day throughout the day we are exposed to good, bad and indifferent customer service.**

JASON: Absolutely. Well my friend, thank you again for doing this and I look forward to the next time our paths cross.

MARTHA: Thank you so much.

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