ORS LookOut

July 11, 2003 Volume 7, Issue 14

ORS Mission:

We deliver pensions, related benefits and services to promote the future financial security of our customers.

ORS Vision:

Fast, easy access to complete and accurate information and exceptional service.

ORS Calendar

July

State Police Board Meeting 17th
Hot Dog Lunch 22nd
Public School Employees Board Meeting 24th

August

State Employees Board Meeting 12th
ORS Picnic 14th
ORS Golf Outing 20th
State Employees' Board Meeting 29th

Videoconferencing arrives in ORS

ORS is preparing to unveil yet another technological step toward providing faster, easier and more efficient customer service. The room in Wing B that was previously occupied by the Vision Project Team has been converted into a videoconferencing center and will be available to supplement the fall PreRetirement Information Meeting (PRIM) schedule.

Working with a specialist from DIT-Telecommunications and vendor consultants from Sprint, Customer Education staff have evaluated and purchased the equipment necessary to link ORS with other videoconferencing sites around the state or country.

Now-retired Customer Education BPO Ken Wright started evaluating this technology in 1998, but due to equipment costs and time constraints the project wasn't feasible at that time. But Ken didn't give up. As with most electronic technology, the costs continued to drop. In September of 2002 he provided a cost-benefit analysis and recommendation to create a videoconferencing center. The project was approved.

There were numerous bumps and hurdles along the way, but finally a location was established, the phone company installed the necessary

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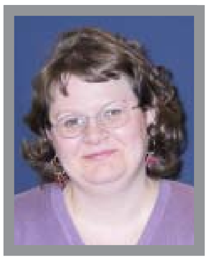
Above: Ray Fleming shows off the new video conferencing equipment in Conference Room V.

Sounding Out *by Lisa Schmidt*

Sounding Out is a way for ORS staff to air ideas, viewpoints, gripes, praises, and/or concerns. E-mail YOUR valued opinion to ORS LookOut.

Forgive: To give up resentment against or desire to punish; stop being angry with; pardon.



Lisa Schmidt

I am in a job where I see the top training classes my coworkers take. Dealing with Difficult People is probably the most popular one. I want to share this story.

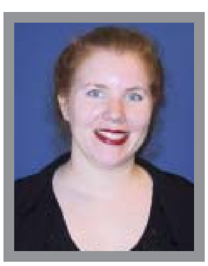
A few years ago a fellow worker used my trust in her to carry out a mean-spirited plot. This caused a major rift in my work world. Seeking guidance in how to carry on in a job I love and seeing her every day, I bought a book titled *Thank You for Being a Pain*. It taught me that every difficult person one encounters is teaching us to be a stronger person.

Whether we are learning to not give our power away (in other words, let them "get our goat"), learning to stand up for ourselves, or simply learning to keep our mouths shut and have pity, they are teaching us something. My particular pot-stirring episode taught me to forgive and then thank those who hurt me because they help me grow with every experience. I still ache at the thought of what that person did to me, but I can be proud that I did not allow her to break my spirit.

The next time you are hurt, wronged or just plain baffled by someone else's behavior, you can do one of two things: get mad and stew which raises your stress level and ultimately causes health problems, or you can ask yourself "is this really worth getting upset about?" It is easier to forgive an action and move on than to hold onto a grudge because, frankly, that person doesn't care if you forgive. You're the one who'd be carrying the ball and chain of putting energy in holding onto anger. Forgive them for yourself. Know that you are the stronger person for doing so.

Life is filled with emotional anguish. Forgive. Forget. Don't worry … be happy.

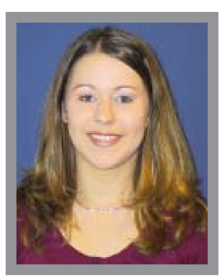
Comings and goings



Tanya Dunckel

ORS welcomes **Tanya Dunckel** and **Sarah Credeur** from Career Quest. They started working with Customer Accounts on July 9 and 10 respectively. Tanya and Sarah, we hope you like it here!

Christine Greenlee from Customer Accounts said goodbye to ORS on Friday, June 27. We wish her well in her future endeavors.



Sarah Credeur

Student assistant **Jerren Osmar** says goodbye to ORS today. He is going on to more entrepreneurial endeavors. We wish him well.

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Call escalation and dealing with upset customers

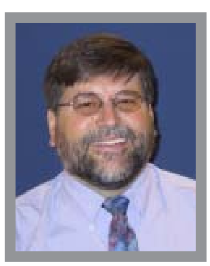
When Customer Accounts staff receive calls from upset or difficult customers who need extra time and attention, they refer calls first to the daily Resource Person. This is usually **Gordon Hicks**, **Bill Motz** or **Cheryl Moore**. Cheryl is on loan to Benefit Management, so **Anne Watros** has stepped into the Resource Person role. If the Resource Person isn't immediately available, the customer is routed to either Claims Processing (**Cindy Adams** or **Dan Harry**), or a Customer Accounts supervisor (**Pam Kibby**, **Joyce Weber** or **Steve Eckert**). In these tough times, Customer Education's **Fred Covert** is also handling calls that require research or some public relations to smooth things over. Our ORS Man On The Street (MOTS) recently chatted with both Fred and Pam about their experiences with these challenging customers.

Man on the Street

MOTS: What exactly is call escalation?

Fred: Call escalation is critical for effective customer service. It allows Customer Accounts staff the chance to move on to other callers, while knowing that someone will take care of this customer's issues.

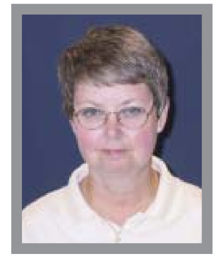
MOTS: How do you respond when you have one of these challenging customers passed on to you?



Fred Covert

Fred: Well, generally the customers are already upset at the point that a call is escalated. So I try to get as much information as I can from the representative in Customer Accounts before I take the call. That way I am able to introduce myself and attempt to restate the issue before anything else is said. This assures the customers that they don't have to explain the whole situation again.

Pam: I take a slightly different approach from Fred. Sometimes customers believe that we don't understand their situation, so I gather basic information, then let the customer share their concerns with me. This way we can both be assured that we understand each other.



Pam Kibby

MOTS: It sounds like you really have to be on top of things. What skills are important when trying to help the customer?

Fred: It's important to be an empathetic listener, while remaining objective to the issue. In many cases, a person is just looking for confirmation and assurance that what ORS staff has said is consistent and true. Straightforward responses are usually very effective.

MOTS: Do you ever have situations that can't be resolved during the initial phone conversation?

Fred: Once in a while. In some cases, there are truly unresolved issues that need to be tracked down and responded to. Most of the time, these require a return phone call. I have found that most upset customers will quickly control themselves if they truly believe they will be helped.

Pam: I have found that customers are willing to wait for a complete and accurate answer, especially if they have a contact person within ORS. I give these customers my name and direct phone number. They know if I don't get back to them, that they can call me directly. I almost always get back to them first, though.

MOTS: What do you do if the customer is still not satisfied with your response or the options available?

Fred: In these cases it's critical to remain calm and consistent. Generally, helping a customer to truly understand the "why" of a problem can take some time, but tends to be very effective at reducing their frustration and anger. Customers may not always like the response, but at least

See Call escalation on page 5

Teamwork + persistence = progress

It's amazing what can be done with some ingenuity and old-fashioned hard work, and you don't have to look far to find examples here in ORS.

Just look at Benefit Management's Claims Processing unit. It became clear to BPL **Lila Christiansen** that public school retirement applications for July 1 retirements were coming in faster than staff could keep up with. So what did she do? She cried "HELP!" The word went out to all processes in ORS for help from anyone who could assist with "set-ups." A set-up is the preliminary communication with a member who has applied for retirement. It acknowledges receipt of the application, confirms the service credit total, calculates an estimated pension benefit, and validates the choices the member has made such as retirement option, beneficiary, and insurances.

Lila was impressed with the response. "It was a great response. We're receiving a lot of help, and everyone referred to us is more than up to the challenge." Claims processor **Lisa Kalchik** affirmed Lila's' comments: "Even though the processing can be confusing, everyone picked up the ball and ran with it. They are exceeding our expectations, are dedicated to the task, and care about what they're doing."

Lila also pointed out some additional benefits. The chance to interact with ORS staff from other processes is always a plus, and also provides an opportunity for non-claims processing staff to learn more about the core business of processing pension payments.

As Lisa pointed out, the biggest benefit is to the customers. We are communicating with them sooner, alleviating their concerns, and decreasing incoming phone calls.

Thanks to all

Thanks to everyone who has pitched in on set-ups, and also to everyone who has helped fill in the gaps while these people are helping out. This is a great example of teamwork that directly benefits our customers.

In addition to claims processing staff **Nick Armit**, **Darla Brzezinski**, **Mary Lowry**, **Marcia Mahoney**, **Brenda Prast**, **Veronica Tsai**, and **Patty Wethy**, trainers **Susan Flowers**, **Lisa Kalchik**, and **Pat VerPlanck** worked with student assistant **Jerren Osmar**; **Mary Barrett** and **Lisa Schmidt** of Process Support; **Charmaine Collings**, **Andy Daignault**, **Pam Kenney**, and **Chuck Simpson** from Customer Education; **Jennifer Drozdzak** and **Cheryl Moore** of Customer Accounts; and **Laurie Abraham**, **Rachel Campbell**, **Tim Droste**, **Dan Harry**, **Ed Helzerman**, **Deb MacGregor**, and **Michelle Thompson** from other Benefit Management units.

OFFICE of RETIREMENT SERVICES
ORS
Department of Management and Budget

Reminder: Orders for shirts with the ORS logo are due to your EMPAC representative by Wednesday, July 23.

July 22 is

National Hot Dog Day!

To celebrate, EMPAC will be hosting a hot dog and apple pie lunch.

Crossroads • 11:30 AM - 1:00 PM

Videoconferencing

Continued from page 1

cabling, Process Support coordinated furniture and equipment delivery, DMB painted, and voilà! —a videoconferencing room emerged.

Some final configuration of the equipment must occur before the equipment is operational. According to Customer Education's **Fred Covert**, who is now leading the project, arrangements are being made with another state agency and the Ottawa Area Intermediate School District to conduct final user testing in July. Once testing is done, "we'll be ready to roll …"

Outreach staff has already begun the task of scheduling videoconferencing sessions for Employer Web Reporting Seminars that will be conducted by connecting with Northern Michigan University (NMU). Similar scheduling for public school employees' Pre-Retirement Information Meetings (PRIMs) in those locations is expected to follow.

How does it work?
Videoconferencing allows ORS staff to provide a face-to-face presentation for as many as three different locations, at the same time, anywhere in the state (or country!) from the comfort of the GOB. Those attending a session will be able to see the ORS presenter, materials presented on a computer such as a PowerPoint presentation, and any printed documents or materials through the use of a special document camera. The presenter controls the cameras and computer using a small handheld device that looks just like a TV or VCR remote control. The presenter will be able to see and talk with the attendees at the other sites, just as if they were in the room.

This technology reduces travel time and travel costs, as well as the risks associated with travel. Additionally, multiple sites can be connected at the same time, increasing the potential efficiency of any meeting. In short, it positions ORS to be able to serve more customers with existing staff while delivering quality information to help more members make better decisions for their future.

For more information on this exciting new means of delivering improved customer service, contact Fred at covertf@michigan.gov.

Call escalation

Continued from page 3

they will understand it and that's 80% of the solution.

MOTS: It sounds like you both have quite a bit of experience in dealing with challenging customers. Do you have any tips for other staff?

Pam: Staff can head off escalating phone calls by acknowledging early in the phone call that the customer has already called us multiple times. The customer will immediately feel better by knowing that we have a record and an understanding of what has already happened. I also encourage staff to recognize early that a customer is upset and needs extra time and support. Pass them on and move to the next call. We'll serve more customers in a better way by doing this.

Fred: When I first started working for ORS nearly 14 years ago, one of our managers, Phyllis Blost, told me something that has always stuck with me. She said, "Whenever I get a customer who is being difficult, I try to picture my mom or dad, or grandma or grandpa, on the other end of the line and how they might react to what I'm saying. It always helps me to put a face on the other end of the call."

This advice has helped me in my job. The customer on the other end of the line doesn't know all the things we know and needs our help to understand. To the customer, this is the *very first time* anyone has been in this particular situation and it is *very* important to get it corrected. Keeping that perspective helps keep me grounded to the customer's needs.

Is e-mail the most appropriate communication tool to use?

E-mail is so quick, so easy, that many of us jump to use it before considering if it's the best tool for this situation. Before writing an e-mail message, ask yourself:

- Should this be said face-to-face?
- Should I call?
- Can I discuss this at a future meeting?

The Communication Checklist (available near pillar B4 just outside the Communication Unit bullpen) can help you decide. It helps anyone with a message decide who should receive the message and the best way of communicating, depending on its urgency and importance as well as the action expected of the receiver. The checklist also recommends the best media for communicating your message.

It's easy to forget that e-mail messages are an official record of our business; just as official as a paper letter or memo. These messages document our daily work and are a snapshot of your workday. Keep this, and the following tips in mind as you write.

Tips on composing an e-mail

Remember that the person you are addressing may receive more than 100 messages a day. Many recipients report increasing frustration over the time it takes to read each day's e-mail messages, especially if many of those messages are the electronic equivalent of junk mail. To prevent frustration, follow these tips:

- **Keep the distribution of your e-mail messages to a minimum.** Given the ease of transmitting an e-mail message to everyone on an existing mailing list, you could be sending messages to people who don't need to see them and thus be adding to their e-mail overload.

- **Keep your messages short.** Try to hold the overall length to the number of lines that will fit on one screen. Limit each line to a maximum of 80 characters.

- **Consider how much background your reader needs to have in order to understand your message.** If you are responding to an issue raised in the earlier e-mail message, it is a great temptation to repeat the earlier message along with your response. Try to paraphrase the earlier message as briefly as possible so as to spare your reader unnecessary verbiage.

- **Provide a subject line for each message you compose.** A subject line helps the recipient of a great many messages screen them quickly to determine which require the fastest action.

- **Restrict each message to one subject.** It is better to send two separate messages than to cover several topics in one message.

- **Organize your sentences in short, single-spaced paragraphs to make your message easier to understand.** Do not indent the opening line of each paragraph, but leave one blank line between paragraphs.

- **Edit and proofread each message carefully, and make the necessary corrections before sending the message.** Because e-mail messages are usually composed on the computer, it is easy to make (and overlook) mistakes in grammar, usage, spelling, and style.

  NOTE: Some e-mail systems provide spelling and grammar checkers, but these devices do not relieve you of the responsibility to check your own material with great care.

- **Do not use all-capital letters in your messages.** This practice is considered to be the equivalent of shouting. Follow the standard rules of capitalization.

Portions of this article were taken from the Gregg Reference Manual – 9th Edition.