

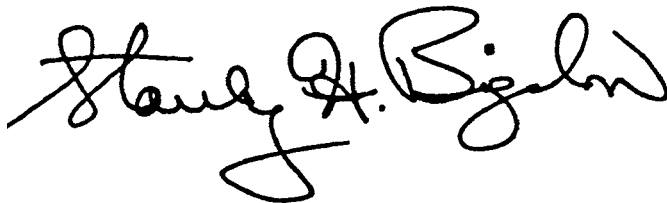
for Customer Service Specialists and their managers

INTER ACT

communicating with people in business

March 2003

We Are Our Own Instructors



InterAct believes companies who accomplish the challenge of releasing the dynamic energy and creative potential of the front-line team will rise head and shoulders above their competitors.

Beckman Coulter, Inc. is accomplishing that goal by making its own front-line people the trainers and motivators of themselves.

Approximately twenty-four Field Service Engineers, Clinical Systems Engineers, and Regional Managers volunteered to be the trainers for seven hundred fifty team members in the service organization. After I completed a Train-the-Trainer program, the new trainers met together in teams and fine-tuned the training to meet their specific needs. They came up with a name for their program, "*Mind Your Business*" that embodies in a few short words the direction of the service industry in the 21st century. The fine-tuning included developing new acronyms and power-point slides and weaving their own life experiences into the principles and skills learned from InterAct.

In a sense, these trainers are pioneers. They are transforming ways of doing business, they are creating a new role for the front line, and they are working together as a team to prepare for the wave of the future.

The enthusiasm of the three trainers interviewed in this newsletter and the benefits they personally and Beckman Coulter, Inc. are receiving from the the training are obvious. It isn't too hard to conclude that customers are beginning to experience the benefits of the training as well. We will be sharing some of their success stories in our future issues.

National Service Manager John Peak's vision for the Beckman Coulter, Inc. service team from day one was "do it ourselves" training. His vision and commitment driving that concept made it happen.

Area Manager Bob Hahnebohm is the advocate of "Mind Your Business". He is the motivational spearhead making sure the training remains on track and that the

enthusiasm doesn't wane. He embodies the principles he teaches and has the respect of all that know him. He loves to teach and practices what he preaches.

We at InterAct are delighted when training takes hold in a process that makes learning a part of the enduring corporate culture. Working together as a team, we believe we have created a powerful combination: the motivational and team building value of doing your own training with the advantage of a professional trainer who has trained thousands of front-line people.

The administrative drive, the natural teacher, the professional instructor and content, and most of all the enthusiastic, creative, and innovative front line/instructors made this happen!

Beckman Coulter, Inc. should be proud!



INTERACT INTERVIEWS

The Front-Line Trainers

by Sandy Campbell

InterAct has always said *the front line is a powerhouse*. The members of the Beckman Coulter Inc. service team who volunteered to be trainers have proved to be just that! *InterAct worked in partnership with Beckman Coulter Inc. to create a Train-the-Trainer program and the results have been amazing!* The Beckman Coulter front line has given a great deal of their talent, time, and energy in developing a customized training program for the whole service organization. The members of the front line who volunteered as trainers have been wildly enthusiastic about creating their own training program, “*Mind Your Business*”, based on key InterAct principles. They have been teaching it to their team members with dedication, passion and more enthusiasm than you can imagine! We will have a series of articles about this program because we believe it is a leading edge effort by Beckman Coulter, Inc. In this issue, several of the trainers share their thoughts about their new role.

Ed Klavins, Senior Field Service Engineer

“A study by Stanford Research Institute, Harvard University, and the Carnegie Foundation found that fifteen percent of the reason people get a job, keep a job, move ahead in the job are their technical skills and ability. Eighty-five percent are their people skills.

“My job has demonstrated absolutely that the people skills are most important. On my first service job, I was less than a week on the job and had no technical skills. There was no formal training, it was all on-the-job training. It was my second day and I was traveling with the technical guru who was training me. He was their best FSE, he was always right, he knew if we had a part and what shelf it was on, he was a walking encyclopedia. But he had no people skills. He always looked at the ground and mumbled and every now and then he would glance up

at you. When we walked into one customer site, he went straight to the equipment and started setting up his tools. I saw the management offices and the manager came up to me and shook my hand and introduced himself. This was a customer whose company was extremely service oriented. We talked a while and the technical guru never said ‘Hello’ or looked up but continued working on the machine. The manager said another problem had cropped up and asked if we could take care of it. I actually had to turn around and talk to my mentor and repeat



The Klavins family from left to right: Carly, Carla, Zoey, Jameson, and Ed (the cats are O'Malley and Leo).

what the manager had asked. He mumbled a response that we could take care of the other problem while we were there but he still didn't interact with the customer. I turned back to the customer and said we would take care of it. Then he said he had another piece of equipment with an ongoing intermittent problem that was really frustrating and asked if there was anything we could do to fix it. At this point I didn't relay the question to my mentor because I knew he wouldn't be much help.

I told the customer that our manager was on top of everything that had been done at their facility and I would talk with him and let him know how frustrated he was and that I was sure we could fix the problem. He was pleased, we talked some more, and he shook my hand and left. My mentor never entered into the conversation. When we arrived back at our office my manager said the customer had called and said I was one of the best people we'd ever sent to his store and asked if I could be his primary FSE. I was dumfounded! Fixing things becomes secondary if you do your job right. We always get the machine fixed - it may take some time, it may take a senior person, worse case scenario is it may have to be replaced, but we always get it fixed. How often do we walk away from a customer we haven't fixed? More often than we probably like to admit!

“I like teaching and customer service is something I am very serious about. Volunteering as a trainer is a great way to put these two interests together. I always look for *see The Front-Line Trainers continued next page*

Inter Act

communicating with people in business

ways to challenge myself and this is a great opportunity. It is a great way to grow and get out of my comfort zone. It is a challenge to put together a class and teach for seven hours. The more I study and practice this material the more it becomes fresh in my mind and easier to use with customers. To teach it you have to really know it and it becomes natural to you. You become an expert. I am always thinking about the skills and when dealing with customers the techniques pop into my mind. The training also helps with relationships with family members, friends, co-workers. You become a better person.

“This program is unique because we are using front-line employees to do the training. We are able to customize the program with real-life stories that demonstrate the principles. With the fifteen years I have in service I can always find a story that fits the principles. Our team members have been through similar experiences and that makes all the difference.

“Beckman Coulter Inc. has been in flux constantly with the acquisition of other companies. This training is a great way to build the team concept. It is easy to get stuck in a rut and do your job day after day without ever thinking beyond it and this training helps you open up your mind. I want people in my class to leave with three good ideas that they can use. I use an example from **Regional Manager John Satkas** who attended Stan’s workshop and found the transactional analysis ideas stuck with him. He was at one customer site that is an incredibly monstrous facility. He had sent an expensive part to the customer without a detailed address so he knew the part was there but he didn’t know where. He explained his problem to the shipping and receiving supervisor who had a chip on his shoulder and started berating John. John thought about the transactional analysis technique, that the supervisor was in the parent role and he needed to assume the child role. He apologized to the supervisor, ‘I’m sorry to create so much work, I should have known better,’ etc. After a short time, the supervisor calmed down and John said he could see the dynamics shift and suddenly the supervisor was an adult and he wanted to talk and solve the problem. It worked beautifully. The supervisor said he had someone whose specialty was tracking down lost shipments and said he could put him to work on it the next morning. John had his part the following afternoon. They both left each other feeling good about the situation.

“There are several **key benefits of the program**:

◆ “A lot of problems can be easily prevented by

taking the time to ask an important question when the technical work is completed, ‘Is there anything else I can do for you or help you with?’ It is amazing what results from this question. I asked one customer that question and she said she had a problem with her billing. We sat down for over an hour looking all the information and I found the problem. To resolve the problem I brought in the Sales Manager, Sales Rep and the Reagent Consultant. We fixed the problem preemptively. If we get all the departments working together it is much easier. **‘That’s not my job’ is not acceptable anymore.**

◆ “**Another long-term benefit is employee retention.** If everyone is operating at a much more efficient level, these nagging problems either won’t happen or can be more easily handled and employees will be happier with their jobs.

◆ “If we achieve **‘very satisfied’** customers they are much more likely to stay with us. Stan gives figures they are six times more likely to repurchase your products and services. I have some long-term customers, one is fourth generation. They get so much easier to take care of because they know you, they know your company, and they know the procedures. You build and grow your base business with **long-term customer loyalty.**

“We have developed several acronyms to illustrate key principles in the program:

◆ “One of my favorites stories from many years ago is a customer who had what Stan would describe as a ‘victim mentality - I’m not O.K., You’re not O.K.’ Nothing was ever right. If there was a classic ‘the glass is half empty’ it was him. He complained about response time, the service, the bill. It was a difficult account to service because it was remote. I didn’t know the principles at the time but I started to build a common ground on my first call. We had a lot of common interests: hunting, fishing, woodworking. Every time I returned we would talk a little more and I could see him turning around. I knew I had finally turned him around completely when I left all my paperwork at his facility and it arrived the next day by Federal Express. He watched every penny so this was amazing. It turned out to be a **WOW (Walk on Water) Account** and they make life so much easier. Turning him around involved a combination of things. I was responsive, I told him I would take care of the problem and I did. I proved I was going to do my job, I proved I cared, and I also established a personal bond. It was a pleasure to be at the account.

see The Front-Line Trainers continued next page

Inter Act

communicating with people in business

◆ **“Pay it forward’.** This concept is based on a movie in which a boy develops a school project that involves him doing three good deeds for three people with the condition that they do three good deeds for three more people so that it could eventually change the whole world. It focuses on customer service and showing appreciation for our internal and external customers.

◆ **“One of my favorites that came from Stan’s class is ‘Moment of Truth’.** We took it a little further and came up with the **‘Moment of Truth Bank’.** The theory is when you first visit your customer you begin to make deposits in your bank and they are incredibly small at first but as you continue to build rapport, the deposits get bigger and bigger. Then you can make a withdrawal when you need to ask customer for a favor.

“I was doing a preventive maintenance call on a Friday and it was my wife’s birthday. I had planned the day carefully and allowed two extra hours. I completed the PMs but the instrument was not working and I was watching the time just roar away. I was running the controls again which was not a quick event and I thought I had it fixed but I wasn’t sure. I spoke to the customer and told her it was my wife’s birthday and she didn’t even let me finish the sentence. She asked, ‘What are you still doing here? If it doesn’t work you can come back Monday, it’s no big deal.’ It turned out the instrument didn’t work and when I returned on Monday the first thing she asked was, ‘How was your dinner?’ She didn’t complain and I knew it had been a hassle for her. But that is the whole point. ***I made a huge withdrawal but you need to have the deposits there first otherwise it is like an armed robbery.*** It really does work.

◆ **“Read it forward’.** We are trying to share good books, audio books, videos, etc. with each other to broaden our knowledge.

“One of the best parts of the training is the open dis-

cussions. ***There is so much experience and knowledge in this company and we receive the full benefit of it in the training sessions.*** When you bring everyone together, everyone gives their input, and the discussions are fantastic!

“The ongoing training is the most important part of the program. The workshops are great and there is

excitement and interest, everyone is pumped up, and then it starts to dwindle. It is normal. The hard part will be to keep the interest and excitement going. What we have done so far is great but it can be a lot better if we keep it going. Some regions are having monthly breakfast meetings and every month they will have a role-play exercise then use the InterAct newsletter to discuss or read it forward. Follow up is the critical part of the whole program. ***Share your success stories. Other people are motivated when they see that the training concepts do work when you use them.***”

Dan Brown

Clinical Systems Engineer



Dan Brown as Spanky the Clown, a role that is a Shrine Circus tradition in his family. Dan says, “Many of my customers come to the circus and bring their families. My clown pictures are in every customer lab.”

in my pocket and when a problem is fixed everyone gets a balloon. Many of my customers come with their families to the Shrine Circus and my clown pictures are on every refrigerator in every lab.”

Dan is starting another tradition as a trainer: “I am interested in teamwork. The best part of my job is working with other people to resolve a problem and learning from each other. Volunteering as a trainer for the InterAct program has enabled me to work extensively with my team members. I’ve always run my territories as a businessowner and that is a key concept in the InterAct training. I always try to be more than just a toolbox to my customers.

see The Front-Line Trainers continued next page

Inter Act

communicating with people in business

“We have put together an extremely well-rounded program. We took all the information that Stan gave us in our train-the-trainer workshop and the materials InterAct provided us, then we brainstormed and we came up with PowerPoint presentations for the program. Most of the PowerPoints are generated directly from the InterAct training program but with our own spin on it. We have created additional acronyms such as ‘**Think**’ before you criticize someone: **T**-is it truthful, **H**-is it helpful, **I**-is it important, **N**-is it necessary, and **K**-is it kind. Ed deserves a ton of credit for putting the power-points together and coming up with extra material. He has done a super job. ***We are presenting the program in module format which best meets our needs. One of the greatest benefits is the input we’ve received from our own employees. The trainers do the same work the front line does and they are very responsive to hearing the ideas and skills from one of their own.***

“***I have focused on ‘Moments of Truth’*** in the program. The number one goal I teach is every time you go into a customer account and fix what is wrong you have met the customer’s expectations and this is not enough by today’s standards. It is important to address any issue that is unresolved while you are on site, talk with the key people, let them know what you did, and make sure they are comfortable with it. You have to exceed expectations and also look for opportunities. Is there a contract or service agreement close to renewal? If they had a service agreement, could they have avoided the problem? Can we persuade them to buy a contract because it saves them money and problems in the long run?”

“***I also focus on being more than a toolbox for the customer.*** We can move the customer from ‘satisfied’ to ‘very satisfied’ if we come through for the customer with quality parts, equipment, hot-line, accurate reagents. The whole Beckman Coulter team must work together to create a ‘very satisfied’ customer. Customer retention and growth are the number one goals and we have to exceed customer expectations for long-term retention. We have to keep the customers we have and word-of-mouth plays a big role in this industry. Service can sell the first machine on reputation.”

“***I commend National Service Manager, John Peak, for buying into the program.*** I appreciate him having the vision to see what it can do. We are setting ourselves apart from our competitors through service and support. John knows what’s going on in our business and is passionate about our company. His vision is for Beckman Coulter, Inc. to remain a leader in medical diagnostics, for stockholders to continue to receive value, and for Beckman Coulter, Inc. to remain a key player in the field for years to come. This training will help make that happen.”

“***Area Manager Bob Hahnebohm is a master*** motivator and the right person to spearhead the program and we have the right trainers conducting the program. These things have contributed to our success.”

“I believe strongly in the program and the majority of employees buy into the program too.”

Kristy Foster

Clinical Engineer

“I volunteered to be a trainer in the program because doing customer service is a key part of my job. Doing your job correctly

involves reading people, dealing with personalities, knowing how to say things, being able to calm down an upset customer, and proving you are there to help them in any way that you can. Often times you can fix the instrument in five minutes but it may take much longer to calm the customer down.”

“***Being in field service is like owning our own business.*** We are given an inventory, we have a budget, and we have expenses we have to be aware of. ***An important part of our training is ‘know your business’, what the numbers mean, and where they come from.*** This comes into play in having a better understanding of negotiation and how we balance the customer’s business and Beckman Coulter, Inc. business. Balancing customer satisfaction and business profit creates a win/win situation.”

“We realize the customer’s needs are always changing and we need to change with them. Everyone realizes ***see The Front-Line Trainers continued next page***”

“I am grateful Beckman Coulter, Inc. has made training an ongoing process and is moving it in-house to other departments and to our customers. Implementing this program is a great vision that will move us forward. It affects the changing needs and expectations of every one. It is a decision that will take us a long way into the future.”

Kristy Foster, Clinical Engineer

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it is worth our while to be able to handle customers as well as we can handle the instrument. Because all the trainers volunteered, we feel very strongly about this program. Everyone who was trained by Stan was suited for this position. We all learned a lot from Stan and the feedback and interaction between all of us is great. We all wanted to be trainers because we all believe this is a very important part of our job.

*“After I completed Stan’s class, as I was talking with customers I found myself questioning if I was really listening to the customer using the points that Stan stressed. I asked myself if I was really hearing what they were saying and trying to discover if there were other issues. **It used to be subconscious and now it is a conscious effort to listen to the customer, make sure I can help them with other needs that may not have anything to do with what I’m actually on site for.**”*

*“The intent is for this training to be an ongoing company-wide training program. When we complete the initial training program for field service, we plan to continue training in our monthly breakfast meetings, schedule refresher courses, conduct courses for new hires, and expand the program to other departments within Beckman Coulter, Inc. and to our customers. **When we went through the initial training we all vowed we would continue the program.**”*

*“Things never stay the same. They are constantly changing and if you aren’t constantly changing you will fall behind. **We all view this program as a way to continue to learn and stay ahead of the game** and we will change the program as the business environment changes.*

*“When I first entered field service each hospital was on its own and made its own decisions. Now most hospitals are part of large healthcare groups. If you can’t make one customer happy, sometimes that is all it takes to make the decision for the entire group not going with your company. It has become a group type atmosphere and a more money conscious industry. **The business environment has changed and our focus on business skills in our training program will help us meet these new challenges.**”*

“Using the front line as trainers is one of the best ways of doing training:

◆ *“The training is being taught by peers. Our team members are hearing it from someone who is going through the same things they are.*

◆ *“The training schedule is flexible. We can schedule training around work that is going on in the field.*

◆ *We can also bring Beckman Coulter, Inc. issues and our own experiences to the training. There are some aspects of our jobs that we take for granted - contracts, preventive maintenance, modifications. An example I talk about in the training is customers often don’t understand or read contracts. Being able to explain it to them is part of the job. The front line needs to understand the contract before they can explain it to the customer.*

◆ *“We are always available for questions. We have emphasized that team members are always very welcome to call us any time with questions about the concepts and training program and give their comments. Team members call with situations that are similar to those we discussed in class and want advice on how best to deal with the problem.*

◆ *“We ask for feedback at the end of every class and if there is something our team members think we need to cover in the next class or something we need to spend more time on, we can always work that into the next class.*

◆ *“We use the InterAct newsletter articles in the classes. We talk about how the articles pertain to our business and how we can implement some of the ideas.*

“I am grateful Beckman Coulter, Inc. has made training an ongoing process and is moving it in-house to other departments and to our customers. Implementing this program is a great vision that will move us forward. It affects the changing needs and expectations of every one. It is a decision that will take us a long way into the future.” ◆

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