
THE SPIRIT OF EXCELLENCE

Leader's Guide

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Introduction

Congratulations! You're a Group Leader. Now, honestly, you may be thinking, "Why me? Don't I already have enough to do?" Perhaps so, but nothing quite as important as this.

You've been selected to help yourself and those around you to succeed at work and life, and to help your organization as well.

If you've never done this before, you're probably a bit nervous. That's natural. There's a good amount of material and probably just a little stage fright. (Generally, most of us feel a bit insecure speaking to other adults.)

Relax! The material is well organized. The participants know less about the material than you do so no one is going to question your knowledge. Besides, the participants do much of the work themselves. Finally, simply leading these sessions will help to overcome that stage fright. When you properly prepare for your role as Leader, you'll find people praising how well you've done.

So relax. This is easy, and it's well worth it to you.

The Spirit of Excellence — a program built around making people feel better about their work and their lives, is a structured approach to improving patient relations through increasing support staff sensitivity and personal communication skills. The caring attitude of staff is a positive link to patient satisfaction. So it is in our best interest to do all we can to provide that care.

Leader materials for **The Spirit of Excellence** consist of the **The Spirit of Excellence** Participant Book, three DVD and this Leader Guide.

The Spirit of Excellence will have a strong, powerful impact on the level of quality service your organization provides if it has the support and committed participation of you and your co-workers. This Leader Guide is designed to provide the tools you need to generate that support.

The Spirit of Excellence was designed to achieve two main objectives:

- 1) Increase the self-worth and self-image of every person within your organization through mastery and daily practice of the **The Spirit of Excellence** philosophy; and
- 2) Improve your organization's position by concentrating on quality service, the key to continued success in the health care community.

To achieve these objectives on and off the job, **The Spirit of Excellence** training should be conducted in a systematic, organized way. At the same time, **The Spirit of Excellence** sessions should be relaxed and informal, for you as well as for the other participants. If at all possible, **The Spirit of Excellence** sessions should not be led by an immediate supervisor. Employees find that their relations with the Group Leader, supervisor or not, will be improved by the frank, open approach of **The Spirit of Excellence** program. They'll appreciate the interest and enthusiasm you bring to the discussions, and they'll translate your interest and enthusiasm into very personal terms. By giving the very tangible evidence of your personal interest in helping your co-workers improve themselves, you're showing that you really care about them as people and really care about superior staff and patient relations.

Because **The Spirit of Excellence** training will help all employees, we recommend that all of them be invited to participate — both new and experienced personnel. For best results, schedule the three **The Spirit of Excellence** group sessions no more than one week apart. Plan to take at least two hours for each group session to give participants the discussion time they'll want and need to explore **The Spirit of Excellence**. There's enough material in each group session to give you and your co-workers plenty of stimulation for constructive group discussion. The more everyone participates in the discussions, the better everyone will understand, remember and apply **The Spirit of Excellence**.

Preparing for the Sessions

Conduct all three **The Spirit of Excellence** sessions in a comfortable, well-ventilated room or space, with plenty of light. Make sure the sessions are free of interruptions so you and the participants won't be distracted. This is particularly true if you're a manager or a supervisor who tends to have many people trying to reach you. During **The Spirit of Excellence** sessions you will be creating a learning mood which can be easily damaged by interruptions. Make sure that all participants have pencils and paper. Select a room which is large enough to allow the participants to stretch out a bit. A comfortable group will be far more receptive to **The Spirit of Excellence** message.

Locate and test out the DVD equipment that you'll be using for **The Spirit of Excellence** sessions. Avoid equipment with inferior loudspeakers or poor images. Technical flaws like these will distract the participants from **The Spirit of Excellence** message.

Allow yourself plenty of room for the equipment that you'll need to conduct **The Spirit of Excellence** group sessions. If you don't know all of the participants on a first-name basis, make a list of participants. You may want to provide nametags. During the sessions, it's very important to address the participants by name to establish a warm and friendly environment.

Make certain that each participant has his or her own personal copy of **The Spirit of Excellence** Participant Book. You and the participants will be referring to it frequently during the sessions, so be sure to read the appropriate sections and exercises before each session.

Ensure that you, as the Group Leader, can be heard by everyone. Speak clearly and distinctly without straining your voice. Don't allow participants to gravitate toward the back of the meeting room.

As much as possible try to hold each session in the same location. Again, the idea is to establish a familiar, comfortable environment.

Finally, take advantage of **The Spirit of Excellence** draft letter included in this Leader's Guide. Personalize it to your taste. Participants will appreciate written confirmation of their involvement. Moreover, written invitations to participate allow you to control the composition of each discussion group. Ideally you should structure groups to represent a broad cross-section of jobs. The frank exchange of ideas and solutions benefits the entire organization, as well as educating everyone in what "the other person" does.

Here's a checklist to follow in planning the effective implementation of **The Spirit of Excellence**:

- 1) Announce the sessions in written form for a specific time and place. Be sure to start on time and to stop on time.
- 2) Select a meeting room where people can be comfortable and not be interrupted.
- 3) Check the meeting room and the DVD equipment prior to each session. You may wish to use a chalkboard or easel as part of your role as Group Leader.
- 4) Read the relevant sections of **The Spirit of Excellence** Leader's Guide and Participant Book prior to the session, including the appropriate exercises.

The Art of Good Leadership

Since you will be conducting **The Spirit of Excellence** group sessions, a few words about group leadership may be in order, especially for those of you who don't do this type of thing on a regular basis.

Above all, you and the participants should enjoy yourselves. Everyone will quickly be at ease in group discussions if the atmosphere is informal. The best way to achieve this atmosphere is to treat **The Spirit of Excellence** as a positive, happy, encouraging approach to improving personal skills, because that's just what **The Spirit of Excellence** is. Encourage everyone to speak candidly and freely.

Everyone will have valid points to make, and as the Group Leader, it is your responsibility to make certain that they feel comfortable and free to participate. Remember, there are no "right" or "wrong" answers to **The Spirit of Excellence** exercises. The emphasis is on opening the lines of communication and developing an awareness and mastery of the power of excellence in quality service to patients and coworkers.

As **The Spirit of Excellence** progresses, gaining involvement is usually not a problem. People want to participate. But, until that natural comfort level is reached, it's important for you, as the Group Leader, to go out of your way to ensure that everyone participates. This Leader's Guide contains sample questions, virtually a "script," for the Group Leader. These questions for Group Leaders are in large type surrounded by boxes, to make them easy to spot. These questions guarantee that the group discussions have maximum impact. Additional instructions to you are printed outside the boxes.

The scripted questions also help you establish and adhere to an agenda for each session. You should not allow the sessions to get off track. As a structured, programmed approach to quality patient relations, each portion of each session is important.

If you add material or encourage lengthy group discussions, be prepared to add one half hour or more to each session.

Don't be tempted to take shortcuts or eliminate portions of sessions. Use **The Spirit of Excellence** materials fully.

At the same time, you do not have to repeat the "script" word-for-word. The important role of the Group Leader is to guide the group's discussion into the principles of **The Spirit of Excellence**. The most comfortable way to do that varies with each group and with each Group Leader. As long as **The Spirit of Excellence** principles are covered fully, feel free to depart from the "script" occasionally.

If you want to depart from the "script," don't just ad-lib. Think about the questions you want to ask, and speak simply and precisely. Remember, you'll be communicating feelings as well as information. Relax and let your personality come through.

When leading the discussions, don't bury your nose in this Leader Guide. Look people in the eye and scan the room while talking. The same applies to listening. When the discussions take off, you'll need to follow along and guide the conversation in the right direction. You can't do that without interested listening. It also helps to keep an open mind. Everyone is entitled to an opinion. Remember, there are no right or wrong answers. The honest exchange of viewpoints is what's "right."

Some Group Leaders feel comfortable standing behind a podium and conducting the session. However, this places a barrier between you and the participants. If you wear reading glasses, use them and carry the Leader's Guide as you move close to and interact with the participants. This will permit an easy flowing dialogue you and they will enjoy.

Don't worry about objections, complaints or disagreements. It's far more important for you to maintain an open, sharing atmosphere in each session than it is to achieve one hundred percent agreement. Allow the group to comment on and to answer objections. By doing so, you'll achieve the objectives of **The Spirit of Excellence**.

Finally, keep the sessions moving. Don't drag them out. By achieving a comfortable, efficient pace, you'll keep participants alert and active. Good leadership requires you to stay on your toes — and a step ahead of the participants.

How to Run the Sessions

First, look for ways to internalize the messages presented in **The Spirit of Excellence**. Use questions relating to problems and situations familiar to the people in your group. Job situations are probably easiest, but don't neglect examples away from the job. The principles of **The Spirit of Excellence** have universal application.

Please keep in mind that the learning process, particularly in a meeting, is very fragile. Don't allow one person to dominate a session. This kind of domination threatens others, particularly subordinates or those less experienced.

Even the best Group Leaders will encounter problems from time to time. But any problem can be turned into an advantage and an opportunity to improve **The Spirit of Excellence** training.

For example, what should you do about a participant who strays from the main topic? Instead of urging him or her to “get back on the track,” which produces resentment and rarely works, ask the participant a specific question on the topic under discussion: “George, several minutes ago Jeanne mentioned that she doesn't always know how to deal with students when things get really hectic. What advice can you give Jeanne for those situations?”

How about participants who start arguing? As we've pointed out, you, as a Group Leader, want a frank and open exchange of views. One hundred percent agreement isn't necessary. But you certainly want to avoid shouting matches. To defuse such situations, physically stand between the debaters so they can't see each other. Then, involve the entire group in the discussion by rephrasing the argument. Ask those in the group for their opinions.

At the opposite end of the spectrum, you may have participants who hold back, or won't participate. Try asking questions of these people by name. Don't push too hard, but get them to talk about their own experiences and feelings, which relate to **The Spirit of Excellence** topics under discussion.

General Leadership Techniques

Make certain that your group sees you not as an expert in quality customer relations, but as a coach or facilitator to help the entire group explore these topics. At the beginning of each meeting, emphasize that each member of the group is free to share personal experiences — good and bad. Suggest that they use the sessions to look for answers to the questions which truly concern them.

You need to build a team atmosphere. Like any team, you and the participants will be more successful implementing the principles of **The Spirit of Excellence** by working as a group, rather than as individuals.

Leadership Options

As we've discussed, one of the most important things that you as a **The Spirit of Excellence** Group Leader can do to make this program work, is to establish the right atmosphere for the group sessions. Ideally, participants should have fun and feel good about participating. Here are some suggestions of things you can do to create and sustain that atmosphere:

- At the start of Session One divide the group into pairs. Ask the people in pairs to interview each other and then have each briefly introduce the other person to the group.
- In any of the sessions, but particularly in the second and third sessions, it is appropriate to ask participants to share successes. For **The Spirit of Excellence** to work, people must feel good about themselves. To do so, we need to spend some time in the sessions focusing on positive events. Have each person share something positive he or she accomplished in the last week.
- At the start of the second session, have participants find three people in the room that they don't usually talk to, and have them give those three people a compliment.
- Have participants list areas of their job or the organization that they'd like to know more about.
- Break up into groups and have participants candidly discuss the barriers to positive communication which they, as individuals, find most troublesome.

These are only a few suggestions. **The Spirit of Excellence** program is flexible. But it does require participation from everyone. As a Group Leader, you know (or will come to know) your participants. Think of things to motivate them and get them enthusiastic. Don't worry about doing something a little silly; after all, **The Spirit of Excellence** should be fun, and a good laugh is a real ice-breaker.

The Art of Seminar Questioning

In conducting these group sessions, try to use open-ended questions that relate to experiences your group may have encountered. **The Spirit of Excellence** is not effectively presented by lecture or directive. Ask questions, and let the participants do the “lecturing” by their answers. In this approach, the Group Leader really acts as an interviewer asking probing questions. The participants learn better when their feelings are involved, not just their intellect. There are three steps to achieving that goal:

- 1) Always ask “open-ended” questions; that is, questions that can’t be answered by a simple yes or no. The questions in this Leader’s Guide are examples of such questions.
- 2) Ask open-ended questions to the group in general, any specific person in the group, or to a “team” of persons within the group.
- 3) Use certain key words, particularly in group questions. For example, ask those in the group to:
 - ★tell why something is important;
 - ★analyze a situation;
 - ★give his or her own story to illustrate a point;
 - ★solve a problem; or
 - ★explain how they feel.

Remember, when in doubt, or if there is no response (or an inappropriate response), KEEP ASKING OPEN-ENDED QUESTIONS.

How a Leader Handles Questions

The best way to handle questions from the group is to answer with another question. Remember, the objective is to get group participants to interact, and to learn from each other through that interaction. The best facilitator avoids answering questions. Here’s how to promote group interaction:

- Return the question to the questioner by rewording it, asking for specifics. For example: “Bill, you asked why saying ‘Have a nice day’ seemed to have such a negative effect on some patients. Let me ask you to share with us an example of when someone said that to you over the past several weeks and it really turned you off?” Or: “Sharon, you asked why remembering a patient’s name is so important. Let me ask you how you feel when people you deal with use your name.”
- Pass the question to another participant. For example: “John has asked how to deal with customer complaints without being negative. Sally, it seems I saw you doing that just the other day. Can you tell us how you handled that situation?”

- When a participant gives a response that is out of line or opposite of **The Spirit of Excellence** strategy, don't argue or disagree yourself. Ask another participant, who you know would probably have a different approach, for their ideas. For example: "Mike, do you agree with Mary's approach?" or "Kathy, could you give us your opinion on what we should do when we face situations like Frank just mentioned?"

The Spirit of Excellence Participant Book — Key Element of the Program

The Spirit of Excellence Participant Book is designed to explore in much greater detail the points covered in the DVD and in the group sessions. It is an important part of **The Spirit of Excellence** program. In many cases, participants will respond far better to the written word than they will to either the DVD or the group sessions.

As a Group Leader, you must emphasize the importance of **The Spirit of Excellence** Participant Book to your group members. Certainly, there is no way that you can force them to read the chapters or to complete the exercises. At the same time, there are many ways you can encourage them to do so.

First, read **The Spirit of Excellence** Participant Book yourself to thoroughly understand the content. It's an invaluable resource for quality service and it will give you ideas to promote discussion.

In your group sessions make sure each participant has his or her own copy of **The Spirit of Excellence** Participant Book and that they write their name on the cover of the book and complete all the exercises included.

Assign Chapters One through Six of **The Spirit of Excellence** Participant Book at the conclusion of Session One. Assign the first Chapter Review Questionnaire at the end of Chapter Six. Ask participants to complete the Chapter Review Questionnaire and hand it in to you at the start of Session Two.

The Spirit of Excellence Participant Book includes exercises and "Questions to Think About" at the end of the chapters. At the beginning of Session Two, take time to discuss some of the exercises and questions included at the end of each of the first six chapters.

Assign Chapters Seven through Twelve of **The Spirit of Excellence** Participant Book at the conclusion of Session Two. Assign the second Chapter Review Questionnaire at the end of Chapter Twelve. Again, ask them to complete and hand it in to you at the start of Session Three.

Review and discuss the second Chapter Review Questionnaire at the beginning of Session Three. Once again, take time to discuss some of the exercises and questions included at the end of each of the last six chapters.

Assign Chapters Four, Five, Eleven and the Follow-Up Review Questionnaire one week before the thirty to sixty day Follow-Up Session is scheduled. Review and discuss the Follow-Up Review Questionnaire during the Follow-Up Session. Create additional interest and momentum for using **The Spirit of Excellence** quality service skills each day.

Sample Letter, Memorandum or Notice About The Spirit of Excellence

(Note: We encourage you to reproduce a version of this notice on your organization's letterhead. Personalize it as much as possible. If possible, you may chose to hand-deliver this notice to each potential participant and while giving him or her the notice say: "I want you to seriously consider participating in **The Spirit of Excellence**. You're a valuable member of our team. I think the concept is great! I'll look forward to seeing you there!")

MEMORANDUM

TO: (Potential Participant's Name Goes Here)

FROM: (Your Name Goes Here)

DATE: (Use Today's Date)

RE: **The Spirit of Excellence** Quality Service Training Program

This is my personal invitation to you to join us for a series of three meetings on **The Spirit of Excellence** Quality Service Training Program. It's designed to benefit both you and our organization, and we should have some fun with it too.

All of us, in one way or another, are important to our success and satisfaction of our patients. The way we treat our patients, their families and friends creates lasting impressions with them.

The basic concepts of **The Spirit of Excellence** that we'll be discussing during the sessions can help us in our daily contact with customers and co-workers, as well as with our families and friends. There has never been a time when positive, effective communications has been in greater demand! Join us to explore the role you fulfill in this important process.

We'll hold our first **The Spirit of Excellence** group meeting at _____ (place) on _____ (day,) _____ (date,) at _____ (time—a.m or p.m.) Please confirm your availability for this time as soon as possible. If you have a conflict, perhaps we can choose a more convenient time so that you can take part in **The Spirit of Excellence**.

I am looking forward to exploring this dynamic quality service and personal growth concept with you.

Sincerely,

(Your signature)

Outline of the Sessions

What you'll accomplish in conducting **The Spirit of Excellence** sessions:

Session One:

- Define internal and external customers
- Identify why patients and their families choose a particular health care facility and, more specifically, what they expect from us
- Identify what is important to our customers
- Understand how attitudes are telegraphed to others through tone of voice, body language and words spoken
- Distinguish between positive and negative forms of communication
- Explain the impact of positive and negative communication on others and on our ability to provide excellent service

Session Two:

- Review Chapters One through Six of the participant book
- Identify accomplishments that you can take pride in
- Speak in a way that shows your concern for others
- Communicate courteously and effectively over the telephone
- Use questioning and listening techniques to solve problems and enhance understanding of the perspectives of others
- Avoid negative forms of communication in interactions with patients, visitors and co-workers

Session Three:

- Review Chapters Seven through Twelve of the Participant Book
- Develop familiarity with the expectations of performance
- Learn how to meet new challenges and resolve problems
- Understand how working together as a team helps to satisfy the needs of patients and other customers

Follow-Up Session

We recommend that the initial **The Spirit of Excellence** sessions be followed up within thirty to sixty days after completion of the third session. The focus of the Follow-Up Session should be the materials discussed in Chapters Four, Five and Eleven of the Participant Book, plus the review questions in the Participant Book. We also recommend that any organization using **The Spirit of Excellence** program design its own orientation program so that all employees hired after the initial presentation can benefit from **The Spirit of Excellence**. The Follow-Up program must be adapted to the particular needs of your organization but you'll find that **The Spirit of Excellence** makes an excellent introductory and orientation tool for all new employees.

Implementation Suggestions

Audience Size

5-10 participants — ideal for new Group Leaders

8-15 participants — the optimum size

16-30 participants — fine, but requires experienced Group Leaders

Implementation: Three Sessions

The above audience sizes are for three separate sessions. Experience has shown that the structured repetition and dialogue among participants works most effectively in three sessions.

Alternative Implementation: One Session

From time to time, particularly in sessions where new employees are trained, either the size of the group or time restraints may require conducting all three **The Spirit of Excellence** sessions in a single, running session. Groups typically need at least five hours for a single combined session. Remember three separate sessions are recommended because the spaced repetition allows the participants to better internalize the learning.

If you do conduct **The Spirit of Excellence** in a one-day session, it is a good idea to distribute the Participant Books seven to ten days in advance and request that the staff read the twelve chapters as a pre-class assignment. You may want to recommend they also complete the Chapter Review Questionnaires on pages 53-54 and 83-84.