

Utilizing Appreciative Inquiry to Improve Customer Service Within the Field of Human Resources: A New Approach to Garnering Trust

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With gratitude to Jack Todaro, my mentor that told me of Appreciative Inquiry training many years ago, had I only listened sooner.

Thank you to Cheryl K. and Ben L., who graciously gave their time and insights to assist with this process.

In the 20 plus years that I've worked in the field of Human Resources (HR), one thing that has always stood out has been the lack of customer service focus within this field. As HR professionals, we are the first and last impression of an organization, therefore, it seems to be a natural conclusion that customer service would be at the center of our focus. Unfortunately, that hasn't always been the case. In fact, it is sadly quite the opposite. HR is most often viewed as unapproachable, feared and seen as either the enemy or, at the very least, an entity of which to be wary. Most people aren't eager to be sent to the Human Resources office. Rather, they are instantly filled with dread.

As an HR professional, I truly enjoy what I do and strive to provide the best possible experience for my customers and those that are on my team. If they are unable to focus because I'm making them uncomfortable or uncertain, then they can't do their job effectively. They need to trust that I'm capable of ensuring they will be paid correctly, their benefits are in place, and they will be notified of pertinent information. If I don't provide that in an effective and professional manner, within promised time frames and with an approachable demeanor, then I haven't given all I can in the capacity that should be expected of my profession.

After taking the AIFT course, I realized that there were others in my field that felt the same way, but how could we "spread the word" to others that may not have the same mind set? What set us apart and how could we help improve our own places of business to give better customer service and gain more trust within the organization so HR is viewed as more of a team player as opposed to a potential adversary?

I decided to reach out to two people that have both insight and influence within their organizations to assist me in this quest to improve the lines of communication between staff, management, and Human Resources. This was also a glimpse to see if I was on the right track or if maybe I was crossing the line into being too friendly with staff.

The first thing I did was arrange a time with each participant, Cheryl, and Ben. These are both long-time HR professionals with different backgrounds than mine in how they came up through the ranks of HR. We each have different levels of education, areas of HR specialty, mix of military and civilian experience, years of service in the field, public and private sector work experience and finally, geographical location.

Each meeting was the same:

- All meetings were held on Zoom
 - A PowerPoint on Appreciative Inquiry (provided) was presented with a thorough discussion of the Five D's and what each designation means
- Discussion of their HR experience and professional background
- Inquiry into their current work situations
- Inquiry about prior work situations

- Exchange of ideas on HR stereotypes and how we break the cycle (change perspectives/approaches?)
- Defined and discussed the detriment HR can have if we aren't providing excellent customer service

Cheryl K.

First up is Cheryl, a Human Resources professional that has worked at the State of Washington in the Executive Branch at a state agency for over 23 years. As she is within a five-year window of retiring from state government, where she's spent the entirety of her career, she has been able to shed light on what her ideas are on some of the issues surrounding the reputation of Human Resources in the context of customer service, or lack thereof.

DISCOVER

- When you started working in Human Resources, what part of the work was most compelling to you?
- Tell me a story related to working in HR that was of significance to you.
- What do you think is important about Human Resources offering excellent customer service to our internal staff?
- Tell me a time when you gave excellent customer service to a team member.
- What approach have you tried when communicating to staff?
- What successes have you had?
- What emotions did you view in yourself when an interaction was successful, and you know that the team member left happy and satisfied with excellent customer service?
- How did relationships influence the outcome?

Cheryl ponders the first question and takes her time to reflect. Since I've known Cheryl for quite some time, I understand that she will be insightful throughout our process and although she isn't known for many words, what Cheryl does say is often well thought out and profound. She answers that she enjoys the variety of work, that the work in HR matters. The customer service aspect of it, promoting people, recruiting, and making sure that people understand their rights are very important to her when contemplating why she entered this field.

She then tells me of a time when there was a new classification going on in the Executive branch of Washington state for legal secretaries. The most challenging portion was working across agencies as this impacted a lot of people and included a pay differential. This wasn't driven by a union; it was driven by the agencies to stay competitive with the private sector. Cheryl states "it all worked out" through good communication and patience. She then goes on to answer my next question saying that it is crucial to maintain good customer service and communication to internal staff, as that is your credibility. Although one person can't do everything, getting back to your staff in a

timely fashion, especially when it has to do with their pay, such as this incident, is very important. Being reasonable, being attentive and saying you'll get back when you will, builds and maintains trust.

I ask Cheryl about a particular time she felt she gave excellent customer service to someone. She states "I think that I complete that with every task I'm engaged in." She feels that from start to finish with a recruitment, new employee orientation and the like, that HR needs to make sure that customer service happens especially since not all departments know or understand what may be required training or they just don't pay attention. What Cheryl has tried when communicating to staff is one on one communication in-person. During Covid, Cheryl said she would email, then follow-up, especially with a new employee. The disconnect of Covid, she goes on, harmed the building of relationships. Unfortunately, that has caused some people to leave her agency; however, Cheryl says that while they are on-staff, they get training, the opportunity to cross-train as well as the ability to enhance their skills so they are ready for possible new employers.

Cheryl thinks that the success she's had, by the way she does business is that people trust her and talk to her about confidential things. Staff knows she has the ear of leadership and rely on her to find low key solutions. They understand that she won't just jump in and make a big deal out of things and will be a diffuser for things that are on a larger scale. For her, knowing that an interaction was successful, and a staff member left satisfied with her assistance, is a success. She feels that there was a stronger relationship built, more trust was established and that is how relationships influenced the outcome of their encounter.

When people are open to her communicating, they listen, see her logic and her why, that is when Cheryl feels communications affect results. She doesn't have a lot of power or responsibility, however, when she talks to them, Cheryl says that staff can see she cares and wants to put the agency in the best spotlight possible. Her job is to make her boss's job easy. Staff and leadership know that honest communication is one of the best ways she can do that. Some of the ways she said this interaction with the reclassification went so well and was different was that she stressed working hard, playing hard, laughing together, and if it was a bad day, they'd meet off-site to commiserate, establishing a bond amongst team members.

EXAMINE BELIEFS/VALUES/PERCEPTIONS:

- Why did it happen this way?
- How were you managing your emotions?

Cheryl laughs a bit when I asked her why I thought things happened the way it did. She says, "we're like an Italian family." Sometimes, the staff may argue or bicker, but at the end of the day, they're a family. Cheryl said that they love hard, fight hard, and agree to disagree to maintain healthy relationships since they all have the same end goal. Cheryl says that she believes that when you come from the heart, as she does, since her heart is invested in doing her job, people see that. They see that she may be vulnerable, yet firm in her communication. She understands that she must motivate staff to do things, and she also understands the politics of the group, so she manages her emotions based on that.

DREAM

- What idea do you have that would help your team accomplish the same level of customer service as this interaction on a regular basis?
- What is your vision for yourself and the HR Department of the future?
- How will you know you're successful?
- How can you effectively leverage the strengths around you to build your dream HR Department?

Taking a long, thoughtful pause, Cheryl said “this is a regular basis thing” for her team, trying to help them accomplish the same level of customer service on a regular basis. She said they may discuss things privately, but publicly, excellent customer service is the norm. The vision for the future for her team is to have as paperless an office as possible, with maximum efficiency, so there's little filing to do. Cheryl went on to say that she would know their department is successful if they can easily retrieve the file. One of the ways she's accomplished that is moving items from email to a spreadsheet. It helps streamline the various forms from different agencies. Finally, when asked how she effectively leverages the strengths around her for the dream HR department, she said she would have a team that is open to communicating and changing things together, using each other's strengths to accomplish the goals set by everyone.

DESIGN

- What strengths can you focus on to ensure continued success?
- What systems or strategies will help achieve this?
- What people or processes can help support you in designing and implementing your HR department?

Cheryl's strengths that she wants to focus on coming from a place of love. She feels that if we put the heart first, to think of the other persons position while attempting to take care of business and find that middle ground will ensure continued success. To achieve this, she feels that being present, showing up and caring about what the team cares about is vital. Continued learning and training is something she feels many people forget to do to keep up with today's everchanging world. She says to help support her in designing and implementing her ideal department, she would definitely invest in Information Systems and technology.

DELIVER

- How can you use this interaction to help leverage your organization to succeed?
- What strengths could you apply elsewhere to build on that success?
- What strengths from this experience could you develop further for continued positive outcomes?
- What can others help you with to develop these and succeed?
- What specific strengths did you see yourself demonstrating?

Cheryl believes that by using the reclassification of the legal secretaries as an example, while working with other agencies will help leverage her organizations success because she feels that every interaction is important. Their agency has a clear mission statement that is easy to follow, and she says that she knows what she needs to do to make things work. She gets her strength and inspiration from other people as they lead their teams whether it's through kindness or cross-training, which helps her apply those strengths elsewhere to build on that success. For example, the agency's IT manager cross-trains and ensures that everyone spends time on the Help Desk, so each team member has the opportunity to grow their skills elsewhere. Cheryl feels that builds strength agency-wide.

The reclassification was a massive undertaking, and to continue positive outcomes, Cheryl feels that resiliency, the ability to survive things when they're awful since not every interaction is positive, helps her remain open-minded, flexible, and creative when it comes to problem-solving and doing her job. She feels that others can help her succeed and develop by helping with technology, the law, and understanding rules about money. She seeks out experts in these areas to help her shore up her decisions. When faced with specific strengths she sees herself demonstrating, Cheryl simply states "Kindness. Always be kind."

Ben L.

Next is Ben, a retired combat Marine Corps veteran with experience recruiting both in the military as well as in state government. Having gone through my presentation, Ben took some time to reflect. Ben states that having grown up on the reservation in Arizona (Ben is from the Navajo Nation), it's in his nature to exhibit a calming demeanor.

Ben has spent a significant amount of time working in Human Resources, although not as much time as Cheryl. He has led a team of six people as an Operations Manager, overseeing the Recruiting Division in a state agency. Ben understands the struggles of having to follow the rules of recruiting in state government and the difficulties the processes and procedures impose on both recruiters and candidates. Helping applicants, hiring managers/supervisors and HR team members through those struggles is a key HR role.

While speaking to Ben, we were able to uncover some of the stereotypes that HR has. Ben has recently moved to New Mexico and works in Colorado. He no longer works in Human Resources, although with his background, his supervisor asks that he review and advise in HR matters.

DISCOVER

- When you started working in Human Resources, what part of the work was most compelling to you?
- Tell me a story related to working in HR that was of significance to you.
- What do you think is important about Human Resources offering excellent customer service to our internal staff?
- Tell me a time when you gave excellent customer service to a team member.
- What approach have you tried when communicating to staff?
- What successes have you had?
- What emotions did you view in yourself when an interaction was successful, and you know that the team member left happy and satisfied with excellent customer service?
- How did relationships influence the outcome?

For the first question, since everyone has various reasons for going into the field Human Resources, it was enlightening to hear Ben's story. He stated that what really drove him into this career with the state of Washington was being a veteran and noticing that "there's a disconnect and HR and their customers/applicants that are applying." He also stated that "the language from the military from the other side, being told there was XYZ, and I thought if I could be that connector and help veterans understand what's going on the state side and the state side understand the veteran side, it would really help anyone who is applying." Ben took that experience and went on to create a specialized system that generated job descriptions that matched both military and state jobs for easier application processes.

When asking Ben to share what was significant to him about working in HR, his story revolved around LinkedIn. He had deleted his account and started a new one. He connected with a social worker, and when she wanted to take social workers with the police, the friend of that social worker was killed while on a call. She stated she wanted to work for my agency to help. What stood out for Ben was that she didn't give up. The managers at his agency took their time and she ended up taking a job with the city of Seattle for much more money. The impact was that they lost many talented, viable applicants because of how slow the hiring process was. It didn't matter how amazing we are (the recruiting team), if we're losing talent because of whatever the holdup is, it discredits HR.

I asked Ben if he thought it was important for Human Resources to offer excellent customer service to internal staff. He immediately responded with "it's HUGE." He went on to explain that integrating new people into their teams, as well as fostering other important relationships can get off to a rocky start if it's not right from the beginning. To be inclusive, he continued, we must offer excellent customer service. Ben mentioned that he has a questionnaire on the hiring process covering the application process to onboarding. The feedback allows the organization to see and fix what's broken.

What was insightful about both Ben's and Cheryl's responses was they both answered the same way (and this was my answer too!) for this next question: when asked a time they gave excellent customer service to a team member, they both immediately answered emphatically "every day." As

an HR professional, this is heartening. However, it makes me ponder since the reputation of Human Resources is one that seems tattered.

Digging deeper, what approach has Ben tried when communicating to staff? Ben said that he has found that during onboarding he asks directly how the person prefers to communicate. Does the person prefer email, text, phone, etc. Ben explained that he tries to communicate face-to-face so the person can see his facial expressions and hand/body gestures. However, since he understands that not everyone is the same, he is respectful and wants to accommodate those that have different preferences of communication. He accomplishes this from the onset of employment.

Ben has had successes with this on his team. Onboarding has been especially a big deal, as the expectations need to be set up front. He says that it sets the tone, makes clear what the team can expect from one another, and ensures new team members know the ground rules. Then, HR can have those conversations that mistakes aren't a bad thing, we can own it and move on. Having this information helps staff not be afraid to try something new or innovative.

The emotions Ben has viewed internally when the interaction was successful, Ben says is when not only did the team member leave happy and satisfied with his customer service, but also when they return to him during times of turmoil. Ben attributes part of this to his heritage. He states that he tries to stay on an even keel, so that they know that even if their hair is on fire and the world is ending, or if it's the best day ever, "the water at surface level is calm, even if you're treading water like hell underneath." Basically, it's knowing your team and their communication preference.

Ben learned in the military that relationships can influence the outcome. He says that he treats everyone as a valued person. He tries to keep the emotion out of his response, look at everybody as equals, regardless of job title, and treat everyone with respect and dignity. He says he keeps his relationships the same. He keeps it in his mind that if he does something for one person, he must do it for someone else.

Having gone through recruiting school in the Marine Corps, he had to learn how communications affected results. He learned things about himself and some things that he said he didn't want to know. The Marine Corps took a video of each person and would play it back so each person could see how they presented when discussing the perks of being in the military, the Marine Corps, specifically, to try and get new recruits. Ben explained that to see his facial expressions, to know that he looked and sounded as he did, forced him to focus on what people see in him and how he communicated.

Going back to interacting with others, specifically with onboarding, Ben says that for him, it's reviewing "What do I want them to be thinking about?" He says he asks himself if he did everything he could for them, was he truly being customer focused, and did this person have an excellent experience during onboarding? He wants to ensure this person wasn't treated like a number and knows Ben was looking out for their best interest.

EXAMINE BELIEFS/VALUES/PERCEPTIONS:

- Why did it happen this way?
- How were you managing your emotions?

Having spent 20 years in the military, Ben tends to go back to his experiences there. He asks himself this question, “how did things happen this way”, while at the same time wanting to provide excellent customer service to people? He states that having worked in larger organizations, his personal experience was that if he was worried about his pay, sick leave, other administrative things, he couldn’t focus on his job. He realized if he could do his job correctly in HR, he would make things easier for others. He wouldn’t get accolades, but it was still impactful to his organization. “One mistake, though, and it’s all you hear.” Ben says he doesn’t want accolades, he just wants to do his job correctly and wants to bring this forward because he wants everyone to be able to focus on their jobs, not on things HR can and should make easy for them.

He goes on say that how he manages his emotions is to stay even keeled. Things tend to work themselves out. Having served in the military for so long, being a combat veteran, he’s learned that in civilian environment things aren’t life and death, so there’s a bit more room for decision making without stress levels being so high as during other scenarios he’s been exposed to.

DREAM

- What idea do you have that would help your team accomplish the same level of customer service as this interaction on a regular basis?
- What is your vision for yourself and the HR Department of the future?
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Ben was thoughtful, as per his usual style when thinking about the first question. He goes on to say that he would start off with looking at the tools on hand and does he have the right equipment to do the job. He says, as an example, the organization currently doesn’t have Microsoft Teams. He states, “How am I allowed to communicate with some customers if I don’t have the most up to date equipment and resources?” He goes on to add that HR, in many aspects, needs to be brought into the 21st century regarding everything, to include getting the right staff in the right roles to treat their customers like he’d like.

Visioning the HR Department for the future, his vision is to continue to add value. Ben thinks that if Human Resources isn’t adding value for their customers, then HR can be outsourced. If the humanness is taken out of the department, it is just “resources.” He believes that HR needs to continue to evolve to be of value to the customers and if the department can’t do that, then where is the value? Furthermore, he will know he’s successful when people just up and tell him he’s made a process easy. Ben expounded on the example of leveraging the strengths around him to build his dream department. He said one of the things he uses is a book called Strength Finder 2.0. It’s a

helpful tool to uncover strengths within oneself and a team, playing to each members fortitude, thereby making the team more effective.

DESIGN

- What strengths can you focus on to ensure continued success?
- What systems or strategies will help achieve this?
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Ben believes that in order to have continued success, it's imperative to be people focused. HR needs to be the support person and cheerleader for employees. The strategy would be long term and focused back on whatever company or organization it is and where the individual employees' career goals are. Ben admits that a lot of it is money driven. If the organization doesn't want to invest in technology or their people, you'll get what you get. He says that without financial support to invest in staff, "it doesn't lead to customer service, just service." However, Ben goes on to say, that if Leadership is on board, and can sell the HR brand, with a solid IT person that can ensure the infrastructure of first-class data technologies to support ideas for now and in the future, while at the same time staying present in the moment.

DELIVER

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Go back, Ben says, and ask the customer, what are we doing right or wrong? These are interactions that can help leverage our organization to succeed. Although Human Resources doesn't want to ask that, you must ask those tough questions, you must ask those difficult questions in any relationship. If you're not asking those questions, it's the only way to move ahead. "It may sting," Ben states, but there may be some good things we learn from our encounters.

If we can build a successful roadmap, you can transfer that to many other areas, Ben believes. How do we interact with our customers? That spills out to every other interaction and how it reflects on the workplace. It will build loyalty and stability, which, in turn, makes retention rates high and saves the company money in the long run. If leadership will sell it.

Others can help me succeed, Ben says, by trust. Trusting me, he states, that "gives me that opportunity to let me do what I need to do. Also, the trust to deliver what I say I will." Ben says that not everyone can do everything and that it is important that he be trusted to be transparent if he isn't able to do something or doesn't have the ability to do it. Not everyone can do everything. It's a matter of knowing your team and delegating.

Finally, he says that one of his biggest strengths that he demonstrates is his ability to listen. Ben says from the top down, people come and talk to him. Part of that is that he doesn't judge, so people trust him, and trust that he won't share what was said to anyone as well. They also know he is competent and will try to give them the best solution he can provide, or at the very least, give them options or maybe things they haven't thought about yet. At times, he will play Devil's advocate, as it allows them to pause and reflect on the decision they're about to make.

PERSONAL CONCLUSIONS

- Human Resources is a position that requires excellent customer service
- Human Resources is a role that has the ability provide excellent customer service
- Without excellent customer service within the Human Resources department, it is detrimental to the entire organization.

Human Resources is exactly that. It is a resource for the humans within an organization. We provide the resources that employees need outside of their job description and duties so they can perform their actual job functions. HR is a space where benefits, pay, counseling, investigations, and a plethora of other roles are performed on behalf of the employee to ensure they enjoy their tenure at the organization.

Human Resources has the ability to provide excellent customer service. There is zero reason why the person in any role within the HR Department shouldn't be able to have a pleasant, professional, approachable, calm demeanor. Throughout my career, sadly, I've been privy to those that have reveled in doing reprimands, investigations, even terminations. While these tasks are sometimes needed, the job of the HR professional "should" be to help those within the institution with items outside the scope of their job descriptions, so they can better perform their job. If people are worried their benefits or pay aren't correct, will they be able to do their job well? Most likely not. Trust in HR is imperative.

Finally, first-rate customer service should be the norm, not the exception when it comes to Human Resources. HR is the first and last contact talent has with a company. This makes a first and last impression. HR generally finds out about marriages, births, (sadly) deaths, departures, retirements, and the like before others. To attract and retain employees, it is imperative that HR make a sound, solid, lasting impression on people from the moment they meet. Interviews are a two-way street and a clumsy on-boarding process, statistics have proven, show that staff will depart a company much sooner than a smooth on-boarding procedure. If HR is competent, professional, approachable, relatable, and all-around providing excellent customer service, the team will know they are taken care of, and that will reverberate throughout the entire organization.

PERSONAL WISHES

As an adjunct professor and Human Resources professional, it is my desire to practice what I preach. In my classes, I let my students know in every class that this is a customer service focused profession. If our customers are taken care of, we're doing our job. Although it is a thankless job, we know we're doing well when we don't hear from people. This role doesn't come with accolades or many thanks, but at the end of the day, there truly is nothing better than offering someone a job, giving someone a raise, or just knowing we made someone's day a bit brighter.

It is important to remember that what questions we ask, actively listening and provocatively propositioning to our internal customers can have vastly different outcomes than if we zero in on "what's wrong" or aren't fully listening to our customers. Being engaged, having the trust of staff, maintaining excellent customer service organization wide from the start to finish of an employee's tenure not only helps the employee excel while employed, it sets a positive tone for the agency or company, making it a more positive workplace, which, in turn, helps the bottom line.