

## Daily Huddle Tool – My Gift to You!

# When Our Service Providers Change... Do We Provide Continuity of Service?

*Beloved companies lock customers in their corporate memory. They honor them by ensuring continuity for serving their needs.*

**Do we make customers begin again?** *Does service continue when accountability changes hands?*

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**Decide to BE THERE.**

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### **Beloved Company Snapshot**

*At Edward Jones, experienced financial advisors help their newest colleagues get started. New advisors are paired with a more experienced advisor and for a year, receive invaluable mentoring. They also take responsibility for some of the mentor's accounts, ensuring that before a new advisor opens his or her own branch, they have seen how to make the business successful and have built relationships with clients.*

### **BE THERE CHALLENGE:**

Providing continuity of service

### **OPENING DISCUSSION: EXPLORE What it Means to Be There**

- Read and discuss all the questions on the front on this card.
- Explore how we interpret the main challenge question.

### **EVALUATE Are We There For Customers?**

- How would we rate our intent and ability to ensure service continuity when customer account contacts change?
- How would our customers say we are doing?
- Do customers rave about our continuity of service today?
- How does our commitment to to lock customers in our corporate memory compare with this beloved company?
- Do our decisions to honor customers by ensuring continuity in serving their needs earn us "beloved" status today?

### **Can we DECIDE to Be There?**

- What do we need to do differently to move toward earning the rave of customers and employees?
- Let's figure out one action item we can take, to ensure that no customer feels lost in the hand-off when service providers change.