



Cleveland Metropolitan School District
Communicate with H.E.A.R.T.[®]
Customer Experience Mystery Shopping

Thank you for your interest in helping CMSD improve our customer service experience. A key component of the Cleveland Transformation Plan is shifting our culture to becoming more service-oriented; improving communication and customer satisfaction. We have been working in partnership with the Cleveland Clinic to implement their Communicate with H.E.A.R.T.[®] customer service program throughout the district. We have provided training to everyone within the district office, and are underway in training our school staffs, in a fundamental approach to interacting with our customers (including scholars, families and caregivers, visitors and other educators) based on the acronym START with Heart:

Smile and greet warmly - A smile and warm tone of voice are universal and appreciated by all cultures.

Tell your name, role and what to expect - To create a lasting first impression, tell your name, role, and clearly explain steps or processes. This identifies our role, creates accountability, and sets realistic expectations.

Active listening and assist - Active listening is a conscious step in order to communicate effectively. We should be physically, mentally, and emotionally present with patients, visitors, and fellow caregivers.

Rapport and relationship building - Creating a personal connection with a scholar, visitor or fellow educator creates an opportunity to keep scholars first and demonstrates that we are invested in more than just the classroom.

Thank the person - Our "thank you" should be sincere, effective and timely. It demonstrates that we appreciate the person's feedback and allows us to continually improve.

We need your help in order to recognize those who are helping move our culture forward, and identify areas where more support is needed. Everyone acknowledges effective feedback as a key component, and all who have been trained were informed we would be implementing a Mystery Shopper evaluation process. To date, our shoppers have come from within the district itself, so we really appreciate the feedback from community members about how you feel the district serves its customers.

In order to Mystery Shop, please choose a scenario from the list provided or feel free to create one of your own, and call the main number or any of the other departments listed. You can also visit any school or office of CMSD in person. Our premise is that any entry point should be able to get you the information you need. Key components we look for beyond the basics of START are:

- **"Point of contact is point of response"** where the person either addresses your concern or provides a clear next step;
- **"Warm transfers"** where the person connects you directly with the appropriate person if they cannot resolve your issue, and introduces you and your situation; and
- **"Follow-up"** where they either thank you after addressing your concern and ask if they may be of further assistance, or they clearly outline steps they will take to resolve your issue and how they will communicate with you until the issue is resolved.

The goal is to play out the scenario as realistically as possible, and for you to respond in the moment to the level of service you are receiving. Communicate with H.E.A.R.T.[®] training also includes a model for service providers to recover the connection if a situation does escalate, and so we want scenarios to play out to the fullest extent within your comfort level.

Next Steps:

1. Use the suggested scenarios or create on of your own, and call whatever you feel might be the appropriate number from the directory list.
2. Open the feedback form so you can track your responses as you go along if you wish, or complete after the interaction.
<https://app.smartsheet.com/b/form?EQBCT=ad67561fa99c45b5b9ef14f2763c8de4>
3. Repeat Steps 1 & 2 as many times as you would like, or have friends do it with you!

Any questions or other feedback, contact HEART@clevelandmetroschools.org.

Thank you for helping the CMSD better serve all its community members!