**SHARE Museums East: Front of House Forum**

**3rd July 2014, Museum of East Anglian Life, Stowmarket**

**1015 – Welcome: Nick Winterbotham, Interim Museum Director, Museum of East Anglian Life**

As the current interim director, Nick was delighted to welcome SHARE to the Museum of East Anglian Life He confirmed that it is so important to focus on customer care, because when a customer approaches a member of the Front of House team, they are, to all intents and purposes, the organisation. Museums are NOT about things; they are about people and today is all about this expertise that lies with front of housepeople providing excellent customer service.

**1040 – Welcome: Simon Floyd, SHARE Co-ordinator, SHARE Museums East**

This network’s position within SHARE, and this forum has so far have been a great success, with people at all levels, paid and unpaid, attending from museums throughout the region, and beyond, plus support from Essex Police in terms of security issues. Staff from museums outside the region have also collaborated with us, and this helps to work towards SHARE’s aim to benefit people in the sector. The target is that everyone involved will gain from the experience, that the speakers will also learn something by trading experience from different places and different levels of expertise. By focusing on peer-to-peer learning, using an informal model, everyone has a voice and every contribution is valued. This is a sea-change within the sector, a focus on interest in each other and each other’s work, whilst looking for areas of useful discussion. This forum has been developed in order to emphasise the importance of Front of House. It may be seen as an entry level role, but it is just as important as other roles within museums. We’ve also been linking up with consumer and retail organisations, where customer service is also important. There are now plans to create an accredited qualification in order to add focus.

A mystery shopper scheme has been organised, allowing those from smaller museums to examine other museums within the region, with the hope that this will encourage more learning, again on a peer-to-peer basis.

A steering group has also been created to focus on maintaining and continuing this forum and SHARE’s development, with Gemma Leader who has recently joined the Steering Group as a ‘younger voice’.

**1050 – Master Class Session: Customer Care the John Lewis Way, with staff from John Lewis Cambridge, Mike Dickens, Tasha May and Pete Rogers**

**Practial presentation session:** as used with new John Lewis staff(Partners)

Mike, Tasha and Pete all have varying levels of experience within John Lewis from 8 months to 23 years.

John Lewis’ customer service training looks at the staff’s mind set when approaching a customer, with the aim of stretching themselves and avoiding their comfort zone!

**The Comfort Zone**: relaxed, secure, easy, automated, robotic, doing the basics.

**The Panic Zone**: out of control, uncomfortable, stressed, anxious, unprepared.

**The Stretch Zone**: staying in control of what’s going on, may include aspects from the other zones, learning new things and new skills.

The stretch zone is the ideal place to be when dealing with a customer and trying to meet their needs.

Attendees were then given a scenario and asked to say which zone they would place themselves in that situation and why.

**Scenario**: Having to watch all of the World Cup

The Comfort Zone: Don’t care, love watching, easy

The Panic Zone: Worried, stressed about England.

The Stretch Zone: You have to do it, not ideal but would have to work at it.

**Pete**: The main aspect of the customer care training is creating a ‘love to sell’ attitude and instilling enthusiasm in the partners. A very large shopper survey (14,000 shoppers) was carried out, in order to get to know the customers and what they wanted. This led John Lewis to a new selling approach as although customers love to buy from John Lewis, due to brand loyalty, the results of the survey highlighted the need for improvement in the way in which customers were treated. The customers wanted the organisation and its staff to show they know them, for the staff to initiate conversation and to constantly demonstrate that the customer is the number one priority. The partners should find out what the customer wants by using open ended questions to discover what they *really* want, then tailoring services and products to the customer. Partners must also inform the customer about the available options for their purchase, e.g. delivery, fitted kitchen service etc.

There is also an emphasis on positive body language, and finishing the customer’s experience with a positive, e.g. ‘have a nice day’ etc.

**Tasha**: A new role was introduced following the survey: the selling coach. These coaches provide extra support and identify areas that need extra work from the partners.

**Mike**: The benefits of this training are measured through partner accountability, monthly meetings with line managers and yearly appraisals. Feedback is given on the job, giving advice and tips one-to-one so the Partners can continue to learn and develop their skills.

As a branch, Cambridge has been historically poor at customer services, but the results of the large survey mentioned earlier provided the impetus for something to change. This challenged the view that John Lewis Partners knew who their customers were, and with the new ways of looking at the customer service aspect of the shop that have been introduced, John Lewis are hoping to reach the top of the John Lewis Customer Service Charts.

**Pete**: We also introduced ‘Love to Sell’, a focus on getting the basics right, with a positive approach to customers, not waiting for them to make the approach to staff, talking to the customers, getting to know them, understanding what they want, what level of information they are looking for, making it relevant to the customer. With much of retail moving online, if they receive a positive in store experience, they are more likely to come back or use John Lewis’ online buying options rather than going elsewhere.

**Tasha**: We also initiated a new focus on Partner involvement, enabling them to understand the aims and reasons for this program. Every day starts with some fun, e.g., murder mystery, with partners learning clues as they carry out their jobs over the course of the day, enabling them to solve the mystery. There are now games that the partners have suggested, as well as the management team.

**The Quiz**: “~~Family~~ Partner Fortunes”

This comprised questions about customer needs and the basics of customer service.

The main points that came out of the quiz were ‘pride in one’s organisation’ and ‘it’s not about the hard sell, it is about impressing the customer with great service’.

Where is John Lewis Cambridge now?

As of Friday this week, John Lewis has been open for 150 years, which is being celebrated by a Partnership Day.

As of May 2014, John Lewis Cambridge has increased its exit service scores dramatically, in February 2014, Cambridge was at the bottom of the John Lewis Customer Service charts, and is now 4th. The exit service scores include exit surveys in shop and customer comments on the website, the surveys involve 3 questions: fast till service, enough partners on shop floor, given correct and appropriate information by partners, and the survey team aims to ask as many people as possible over the course of a day. The questions are scored from 1 to 5, and only 5s count. This means that only excellence is recognised. As well as this improvement, Verdict Retail has rated John Lewis and Waitrose Cambridge very highly.

**1145 – Standard Operating Procedures: What are they and why do they matter? Interactive session with Ian Leonard, Visitor Services Manager at Chelmsford Museums and Jo Barrett, Team Leader, Visitor Services, Fitzwilliam Museum**

How to Write an SOP (Standard Operating Procedure)

It is strongly advised that all organisations have one, as everyone needs to learn as things change and SOPs act as a written record of what to do, which is especially useful when a certain member of staff is not around/unavailable.

**Definition**: a detailed explanation of how a policy is to be implemented. It is high on details, it communicates who will perform the task, what is required for the task, where it will be carried out, when it will be done and how it will be done. E.g. setting alarms, operating the tills.

Not always called SOPs, can be user manuals, idiot guides etc. It just needs to be neat, concise and easy to understand.

**Benefits**: They include step-by-step procedures that enable anyone within the organisation to carry out the task in a consistent manner. They also serve as an instructional resource that allows employees to act without asking for directions, reassurance or guidance.

**Purpose**: A foundation for job descriptions, performance reviews, disciplinary procedures.

They can be made as idiot-proof or as simple as the organisation likes. There is no wrong way to write one, it just has to be fit for purpose. They are a very, very thorough checklist, and ensure that a consistent staff awareness level is maintained throughout the organisation.

**Consider your knowledge**: Are you the right person to write the SOP? Involve other members of staff, match the language to the knowledge and investment of the staff. At the Fitzwilliam Museum, customer service staff wrote the SOP for dealing with large foreign language groups. They are the people who come into contact with these groups every day and so know the best and easiest ways to manage them.

It is not something that staff WANT to read, but they do need to read it as they need to understand what is required of them. It must be clear and concise, as a general rule, sentences should be short and clear. Photographs can also be included as easy references for the tasks.

Test the SOP, both on those who have done the job and those who have never done it, does it cover every point? Is anything missing? If they can carry out the task without extra assistance then the SOP is fit for purpose.

They should also be continually reviewed and altered as rules, regulations and procedures change, and once it is complete, the SOP must be implemented across the organisation.

An SOP is very useful when in a stressful situation, as the steps should all be laid out clearly.It also should make it easier for staff and volunteers to fulfil their roles, ensuring that each person knows what is expected of them.

Again, chiming with John Lewis, ‘Doing the basics brilliantly’

**Kate Carreno, Assistant Director, Central Services, Fitzwilliam Museum, University of Cambridge Museums**

The University of Cambridge Museums in collaboration with SHARE are delighted once again to have organised this forum, one of a series of Front of House events held since 4/2013. Front of House, Visitor Services and Security are vital to the running of all of our organisations. They are the first people that visitors encounter, and can impact on the visitors enjoyment of the venue and their willingness to return.

1315 – **VAQAS with Visit England: Is this for us? Tell us more!** With Vicky Howell, Quality Assurance Schemes Executive.

Prior to starting her job with Visit England, Vicky was a mystery shopper, and has done the mystery shopping for John Lewis.

Tourism brings £106 billion to England, both directly and indirectly. London is the market leader in this sector, but the rest of the country does have a sizable tourist income. VE is committed to growing tourism by 5% every year, driving partnerships and collaborations within organisations, and in particular, to growing the tourism market outside of London.

VE is the national tourism board, they guide the government on related issues, promote tourism within England and offer a whole range of insights into tourism and visitor economy in England. Their target is to increase visitor spending across England.

VE works with destinations to sustain and grow tourism, by presenting the attraction to the customer, encourage market and quality development, supporting businesses to thrive (e.g. with social media use), and have an in depth understanding of national and local performance and can share insights and trends.

VH is part of the enterprise team and deals with industry face-to-face, encouraging them to increasingly work with each other to improve and offer advice and support. The culture sector is one of the fastest growing sectors at the moment, with the number of jobs growing by 5%, compared to 2% in other sectors.

VE covers all visitor attractions, from all sectors and all sizes. Organisations have chosen to join the VAQAS scheme for support, staff motivation, Awards, PR, training needs, advice, funding applications etc.

Membership provides assurance for customers, both domestic and overseas; there is a VE quality award (including plaques, logos, stickers etc to promote awareness), mystery shopper schemes, plus professional tourist board backed advice with support and offers of targeted help and advice to help attractions grow. All mystery shoppers are industry professionals, many have previously worked at attractions, as well as directly with attractions, and include shoppers of all ages in order to garner a full range of experiences.

In 2012 the VAQAS scheme underwent a review. It looked at whether visitors recognised the VE marque, did it affect their decisions on where to go and whether the attractions felt the marque was a valuable sign of merit for them to have. The expertise of the assessors was also examined, were their experiences relevant to the attractions they were looking at? This would affect the thoroughness of the assessments and the consistency with which the review criteria were applied.

There was a change to the scheme after this review. The assessment now concludes with both a debrief and written report: the face-to-face debrief covers any recent changes, recent funding, funding under consideration, as well as giving the organisation a chance to ask the assessor questions, as well as receiving instant feedback from the assessment. This is followed up by a written report, which can act as a management tool and can provide back-up for funding. The aim of using two methods of feedback is sharing best practice and making sure that valuable hints and tips are passed on. It is also motivating for the staff both from hearing the positive and negative reviews,because they receive advice on how to improve. The new system furtherprovides a useful benchmarking structure as well as a detailed written report.

All attractions now receive their assessment scores which was not previously the case. There are new assessment areas as previously only 4 questions were utilised. For a large organisation this was not thorough enough. There are now questions that cover all staff areas, including efficiency, customer care, knowledge and appearance. Minimum consistent standards have been introduced and now all sections must meet this minimum standard in order to pass. Benchmarking stats will also be released, including minimum and average scores, both locally and nationwide. There is also detailed evidence to back up the scoring.

The assessments and associated feedback are all about encouraging the attractions to exceed visitor expectations: e.g. doing the basics well in order to make a difference, good free Wi-Fi, spotless toilets, a good café, listening and talking to visitors, checking reviews and acting on them, highlighting what makes the attraction special, drawing attention to good exhibitions, telling interesting stories about the exhibits, making personal links between staff and visitors, posting online reviews.

Visit England is also introducing 5 accolades: awarded to attractions which demonstrate excellence in key areas, which achieve the minimum scoring requirements, and are then nominated by the Quality Assessors. The results are announced 3 times a year, with a national press release but Visit England also offer advice for the attraction’s own publicity regarding the accolade announcements.

The 5 accolades are: Best Told Story, Quality Café, Gold (covers the whole attraction), Welcome (the staff) and Hidden Gem (less recognised, smaller attractions i.e. <20,000 visitors)

Social media, the website and the leaflets will be looked at before the visit, as they are key tools for attracting visitors. First impressions also count- how easy is it to get around, cleanliness of attraction and toilets, maintenance, catering outlet (range and quality, appropriateness of goods in the shop, judging the staff (welcome, friendliness, efficiency, knowledge) all go towards the outcome of the assessment.

VE helps with marketing advice and strategies, including marketing opportunities with the national press, both front-page and in-paper advertising, and promotions within supermarkets, with roughly 100-150 attractions within each scheme.

VE are also looking at encouraging attractions to highlight clearly their accessibility status. By publicising the accessibility of the attraction, including photos in the marketing, website, leaflets etc. the attraction’s share of this market should increase as people are more likely to visit if they can see individuals like them in the marketing literature. As a sector of the market, the accessible tourism market is a hugely beneficial. Such visitors are more likely to spend longer at the attraction, more likely to spend more money, more likely to return. The functionality of an attraction’s hearing Loops are assessed – are they tested weekly along with fire alarms? The attraction must ensure all staff know how to use them. Assessors will certainly test them on such procedures during their visit.

The costs for membership of the scheme have been made as low as possible, although VE is aware that it may still be a prohibitive amount for small attractions, especially those with free entry.

1400 – **Museum Paradox**: Welcome/Vigilance with Steve Armson-Smith from Essex Police (Heritage Crime) and Phil Wheeler, Head of Security, Fitzwilliam Museum

Steve is based within the Colchester area, but also looks after heritage and related crime within the county of Essex.

The best security tool is the eyes, and making sure that we see what we’re looking at, as well as paying attention to that gut feeling that something isn’t quite right. It is important in these situations to make a note of what’s going on, using pencil and paper in order to remember things, recording the date, the time as well as mentioning details of the incident. Staff must also be aware of the importance of paying attention to their surroundings, noticing things that aren’t quite right, and must feel empowered enough to challenge someone in the wrong place. This can be in a positive fashion, still behaving as a professional Front of House individual but with the aim of letting the person know that the staff are aware of them.

**Bogus caller, Distraction and Hostile reconnaissance.**

There were 2 incident exercises during the course of the day:

This morning: a lost child was reported by two young girls. This provided a distraction and would have provided ideal cover for a reconnaissance of the contents of the room.

This afternoon: man in a white coat, dark hair, average height, normal to stocky build, red shoes, and wearing a lab coat, walked through the room and took a laptop from beside the projector screen. This used the ‘bogus caller’ technique - the man looked as if he belonged there and that he knew what he was doing.

Again, the importance of paying attention to one’s environment was highlighted, especially when talking to customers for example, if they have a member of staff’s entire attention, that member of staff will not notice anything else going on, e.g. distraction by one member of a gang while the other takes something or does the reconnaissance.

A good CCTV system is also a worthy investment, but the date and time must be correct, and the quality of the footage must be good, as if these are incorrect/poor, the CCTV footage will not be of use in a court. Those installing the system must also be aware of trees and foliage growing around the cameras as they may impair the footage, and the compass direction the cameras face, as a rising/setting sun shining straight at the camera will prevent usable footage being recorded.

1500 – **Hot Topics:** Hannah Cruse, a young Visitor Services Trainee from Museum of East Anglian Life, told of her experiences.

Hannah joined the Museum of East Anglian Life 3 months ago, for a year long traineeship, with a month long overlap with the previous trainee, as well as training from her line manager. She was an archaeology student, and always wanted to go into the museum sector, but chose to do the visitor services traineeship as it’s such a vital role within this sector. She was thrown in the deep end event-wise as it was Easter soon after her arrival (a big event at the Museum). She also looks after room bookings, was heavily involved in the recent beer and blues festivals, and as part of her traineeship will be organising a Christmas craft fair later this year. The traineeship is providing career and life skills that she will carry with her, even if she returns to more archaeology and collection focused work. Hannah hadn’t found anything local to her in Hampshire, so was looking further afield, and found this and a couple of other jobs online and chose this one.

A lot of the work at the museum is done by volunteers, the grounds and the animals are solely looked after by volunteers and they also work on the visitor services side as well.

**Looking at Visitor Numbers and tracking/anticipating them**:

Record external factors, i.e. weather, related events e.g. WWI anniversary, national ‘Days’ e.g. armed forces day, sports events, as these can have an impact on visitor numbers. As can other events in the locality, especially free events which may ‘steal’ visitors from paying events or attractions.

**Hot topic suggestions**: Friends vs. Volunteers, and their roles within organisations.