



Grow and **THRIVE** *at Beacon*

LEADERSHIP SUMMIT 2024

Cultivating Customer Relationships



I cultivate customer relationships.

I regularly **C**ommunicate with my customers.

I **U**nderstand what my customer needs.

I **L**isten to my customers attentively.

My customers **T**rust me because I do what I say I am going to do.

I act with **I**ntegrity when I deal with my customers.

Our **V**alues help me make better decisions.

I choose to **A**ct decisively when customers provide feedback.

I use **T**echnology to prioritize tasks and drive change.

I actively **E**ngage with customers to get their inputs.



We care



We do the right thing



We collaborate



We have fun

Introductions



Manu Agarwal



Nick Vallone



Bob Koban



Josh Blakeley

Are you ready for your message?



One person at the table will get a message. Please listen to it carefully.

Throughout the session, please pay attention to the prompts that will guide you on what to do with your message.

Who is your customer?



External

- School Districts
- Govt. agencies
- Municipalities
- Private companies

Stakeholders

- Passengers
- Communities
- Caregivers

Internal

- Employees
- Co-workers
- Vendors

Who: The customer

What: Communication & cultivation

So.....



When?



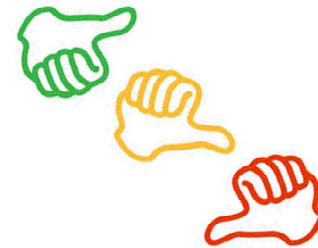
Where?



Why?



How?



Who: The customer

What: Communication

So.., When, Where, Why and How?

When: How often do you have communication with your customer?
Daily, once per week, monthly, a few times a year, never

Where: Through what mode of communication do you communicate with your customer the most?
Phone, Email/Text, verbally, non-verbally

Why: Top reason you are communicating with your customer?
Pro-actively, Re-actively, on a schedule, informatively

How: Does the communication typically end?
Positively, with no actionable follow-ups
Negatively with actionable follow-up's
Neutral, cordial



Remember that message?



Please pass the message to the person on your left.



Who: The Customer

What: Communication

So When, Where, Why and How?

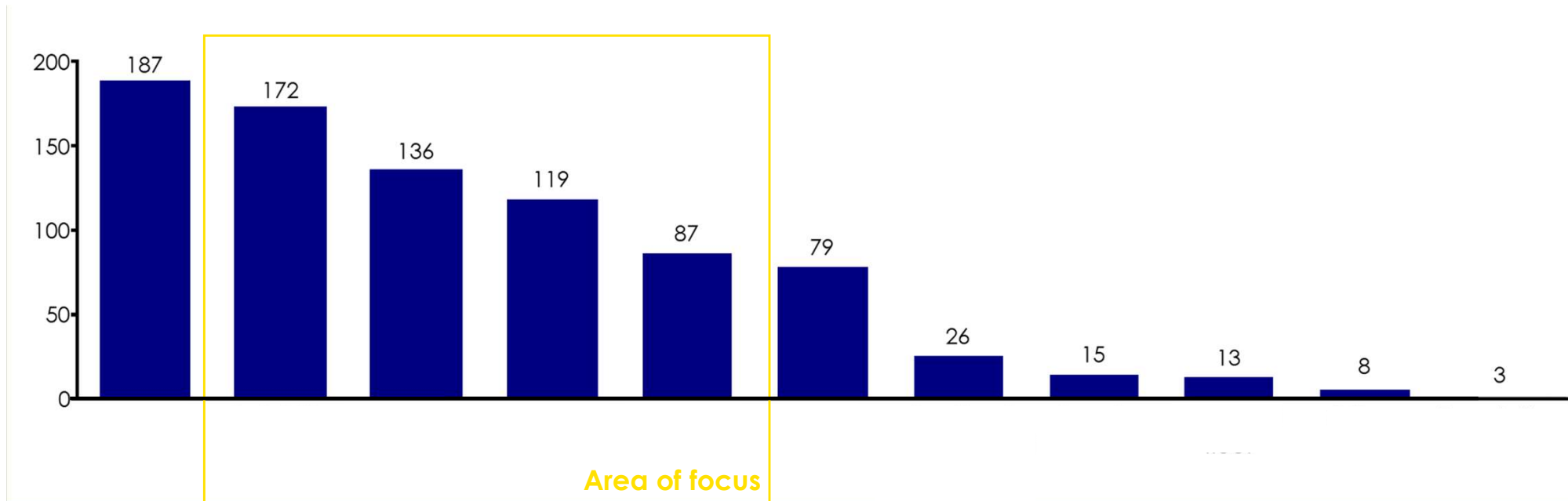
External School Districts Municipalities/Transit Private Business		Stakeholders Passengers Communities Caregivers		Internal Employees Co-workers Vendors	
<u>How Often?</u>	<u>What mode?</u>	<u>How Often?</u>	<u>What mode?</u>	<u>How Often?</u>	<u>What mode?</u>
<u>Daily</u> ○ ○ ○ ○ ○ ○ ○	<u>Phone</u> ○ ○ ○ ○ ○ ○ ○	<u>Daily</u> ○ ○ ○ ○ ○ ○ ○	<u>Phone</u> ○ ○ ○ ○ ○ ○ ○	<u>Daily</u> ○ ○ ○ ○ ○ ○ ○	<u>Phone</u> ○ ○ ○ ○ ○ ○ ○
<u>Weekly</u> ○ ○ ○ ○ ○ ○ ○	<u>Email/Text</u> ○ ○ ○ ○ ○ ○ ○	<u>Weekly</u> ○ ○ ○ ○ ○ ○ ○	<u>Email/Text</u> ○ ○ ○ ○ ○ ○ ○	<u>Weekly</u> ○ ○ ○ ○ ○ ○ ○	<u>Email/Text</u> ○ ○ ○ ○ ○ ○ ○
<u>Monthly</u> ○ ○ ○ ○ ○ ○ ○	<u>In person</u> ○ ○ ○ ○ ○ ○ ○	<u>Monthly</u> ○ ○ ○ ○ ○ ○ ○	<u>In person</u> ○ ○ ○ ○ ○ ○ ○	<u>Monthly</u> ○ ○ ○ ○ ○ ○ ○	<u>In person</u> ○ ○ ○ ○ ○ ○ ○
<u>Top reason?</u>	<u>Result?</u>	<u>Top reason?</u>	<u>Result?</u>	<u>Top reason?</u>	<u>Result?</u>
<u>Proactive</u> ○ ○ ○ ○ ○ ○ ○	<u>Positive</u> ○ ○ ○ ○ ○ ○ ○	<u>Proactive</u> ○ ○ ○ ○ ○ ○ ○	<u>Positive</u> ○ ○ ○ ○ ○ ○ ○	<u>Proactive</u> ○ ○ ○ ○ ○ ○ ○	<u>Positive</u> ○ ○ ○ ○ ○ ○ ○
<u>Reactive</u> ○ ○ ○ ○ ○ ○ ○	<u>Negative</u> ○ ○ ○ ○ ○ ○ ○	<u>Reactive</u> ○ ○ ○ ○ ○ ○ ○	<u>Negative</u> ○ ○ ○ ○ ○ ○ ○	<u>Reactive</u> ○ ○ ○ ○ ○ ○ ○	<u>Negative</u> ○ ○ ○ ○ ○ ○ ○
<u>Scheduled</u> ○ ○ ○ ○ ○ ○ ○	<u>Neutral</u> ○ ○ ○ ○ ○ ○ ○	<u>Scheduled</u> ○ ○ ○ ○ ○ ○ ○	<u>Neutral</u> ○ ○ ○ ○ ○ ○ ○	<u>Scheduled</u> ○ ○ ○ ○ ○ ○ ○	<u>Neutral</u> ○ ○ ○ ○ ○ ○ ○

Why are we here: why does it matter?



What do our customers want?

We take care of our people – do we take care of our customers?



Remember that message?



Please pass the message to the person on your left.

A recipe for great communication!

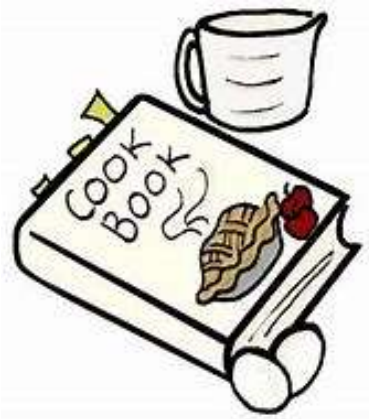
1. **Clarity:** Make Your Point Clearly
2. **Brevity:** Make Your Point Quickly
3. **Context:** Make Your Message Relevant
4. **Impact:** Make Your Message Memorable
5. **Value:** Make Your Message Valuable



Soft skills - Effective communicator



A recipe for great communication!



- Be concise
- Active Listening
- Empathy
- Feedback
- Non-Verbal Communication
- Adaptability
- Confidence
- Conflict Resolution
- Building Relationships
- Clear Communication of Goals and Expectations

Soft skills - Executive presence



Remember that message?



Please pass the message to the person on your left.

Soft skills (continued)



What is common between the companies in row 1 vs row 2?



Bias to act

- **Speed matters:** swift decisions matter as things change rapidly
- Clear thinking + fast action = good results
- Most decisions can be altered and course correction is possible
- We learn by acting and failing fast is an opportunity

You miss 100% of the shots you don't take – Wayne Gretzky

Remember that message?



Please pass the message to the person on your left.

Soft skills



Build and Maintain Strong Customer Relationships – Mark Morin



A recipe to Build and Maintain Strong Customer Relationships!

Know the Customer: Know as people, not as consumers

Know how to Connect: Connect Individually to the people

Earn their Trust:

- Provide top-notch customer service
- Be honest and transparent
- Connect with customers and value relationship
- Be yourself and show sincerity

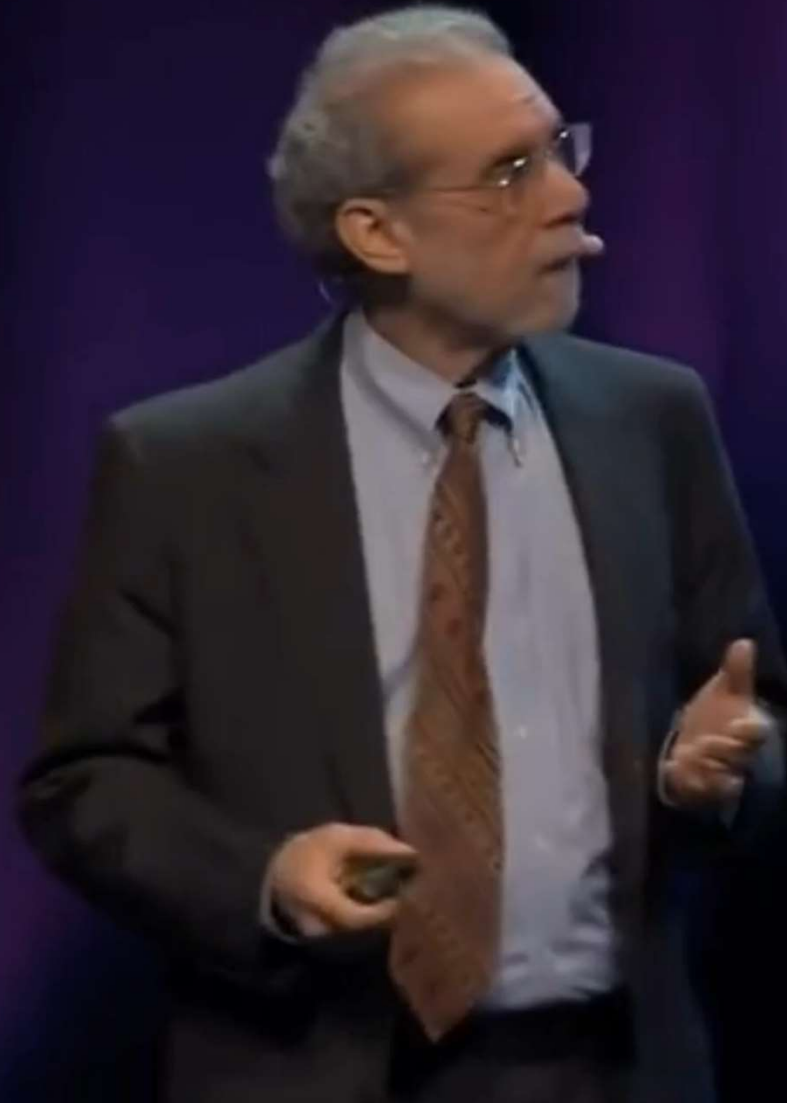


A recipe to Build and Maintain Strong Customer Relationships!

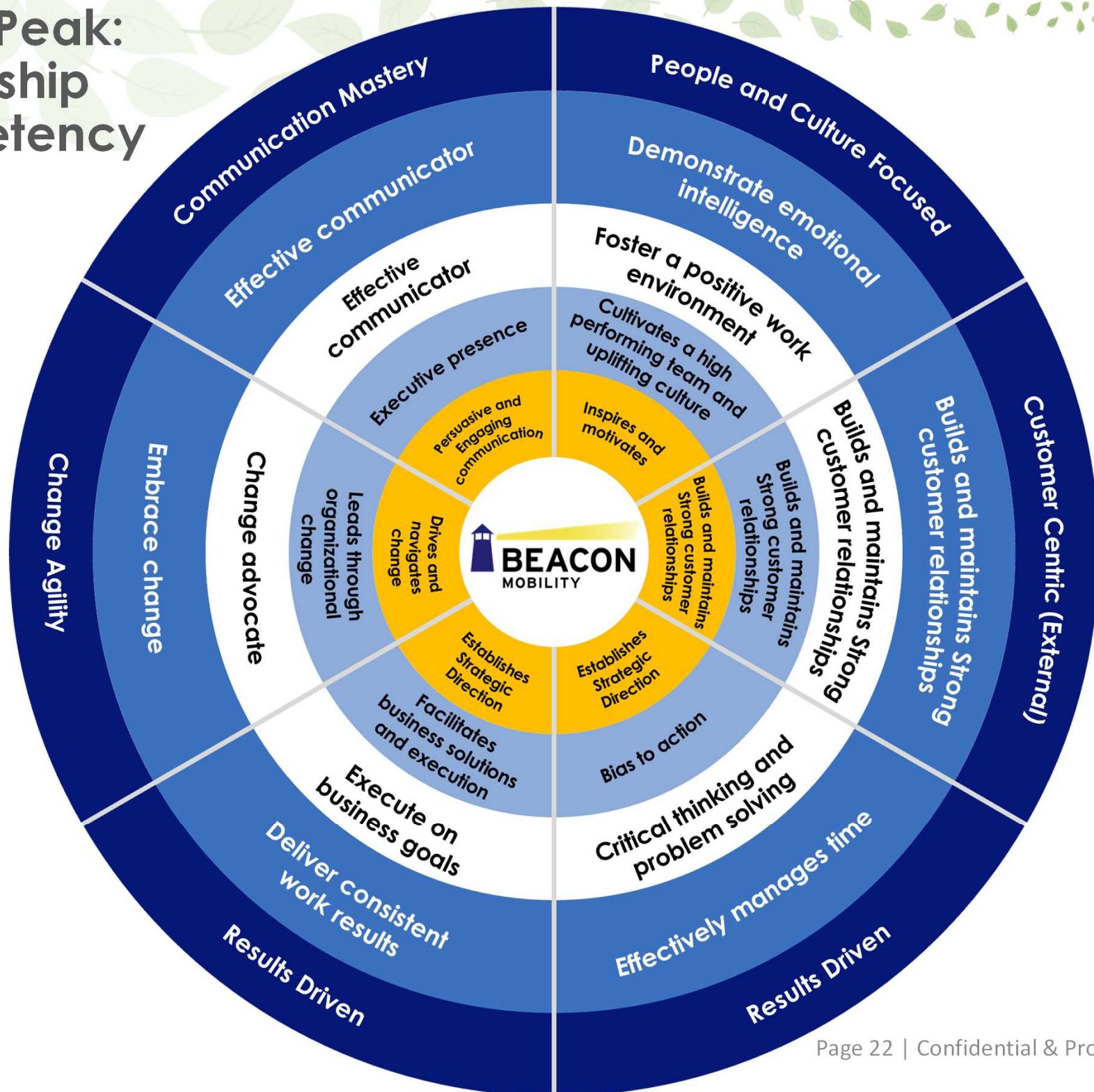
- Communication
- Problem-solving
- Patience
- Respectfulness
- Teamwork
- Positivity and enthusiasm
- Time management
- Feedback orientation



Soft skills – Demonstrate emotional intelligence



Sneak Peak: Leadership Competency Model



Remember that message?



Please pass the message to the person on your left.

Let's use those skills



Analyze the scenario presented on the wall for your table and amongst the group discuss how would you address this situation?

Please highlight which soft skill would you primarily use and how?

Assign one person who will present for the group.

Discussion time: 2 mins

Soft Skills - discussed



- Effective communicator
- Executive presence
- Build and maintain strong customer relationships
- Bias to action
- Demonstrate emotional intelligence



External Customer:

Kelly, a Transportation Coordinator with a school district calls and demands that a driver needs to remove a Tik Tok video that she posted complaining about “a” child’s behavior on a bus.

The child’s parent called in to complain because even though no names are stated and school district is not mentioned, she still knows its about her kid.



Internal Customer:

Tonya, a valued dispatcher, that has been with the company for many years requests excessive time off under the Unlimited PTO Policy, and has just submitted a request in Workday for a week vacation that coincides with the start of the school year.

Remember that message?



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What was the message?



Dominique was late 7 times last month and 3 times in July. I am writing him up and suspending for 3 days effective September 3rd.

Transit routes 3 and 5 are 13 minutes late this morning. Routes 1, 2 and 4 are on time.

Draw a triangle inside a circle inside a square

Draw a stick figure with curly hair and big shoes.

Introducing a communication solution for the future





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