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Title of Presentation

The 4C'S Project

Champions for Leadership
June 21, 2011

Background

- **Joined District Business and Advisory Services (DBAS) in July 2010.**
- **DBAS going through a transition phase.** Have a team based approach to providing services to districts.
- **Staff turnover**
- **Staff were being cross trained**
- **Alignment of the staff into teams**
- **Around the same time DBAS got the results of the annual District Satisfaction survey:**
 - Results were not impressive.
 - Feedback was not reflective of the experiences of the majority of the districts' staff.
 - Turnaround time – feedback was received about midway through the following year.
- **I wanted to develop a tool to support the goals of the organization and provide an effective means of measuring performance.**

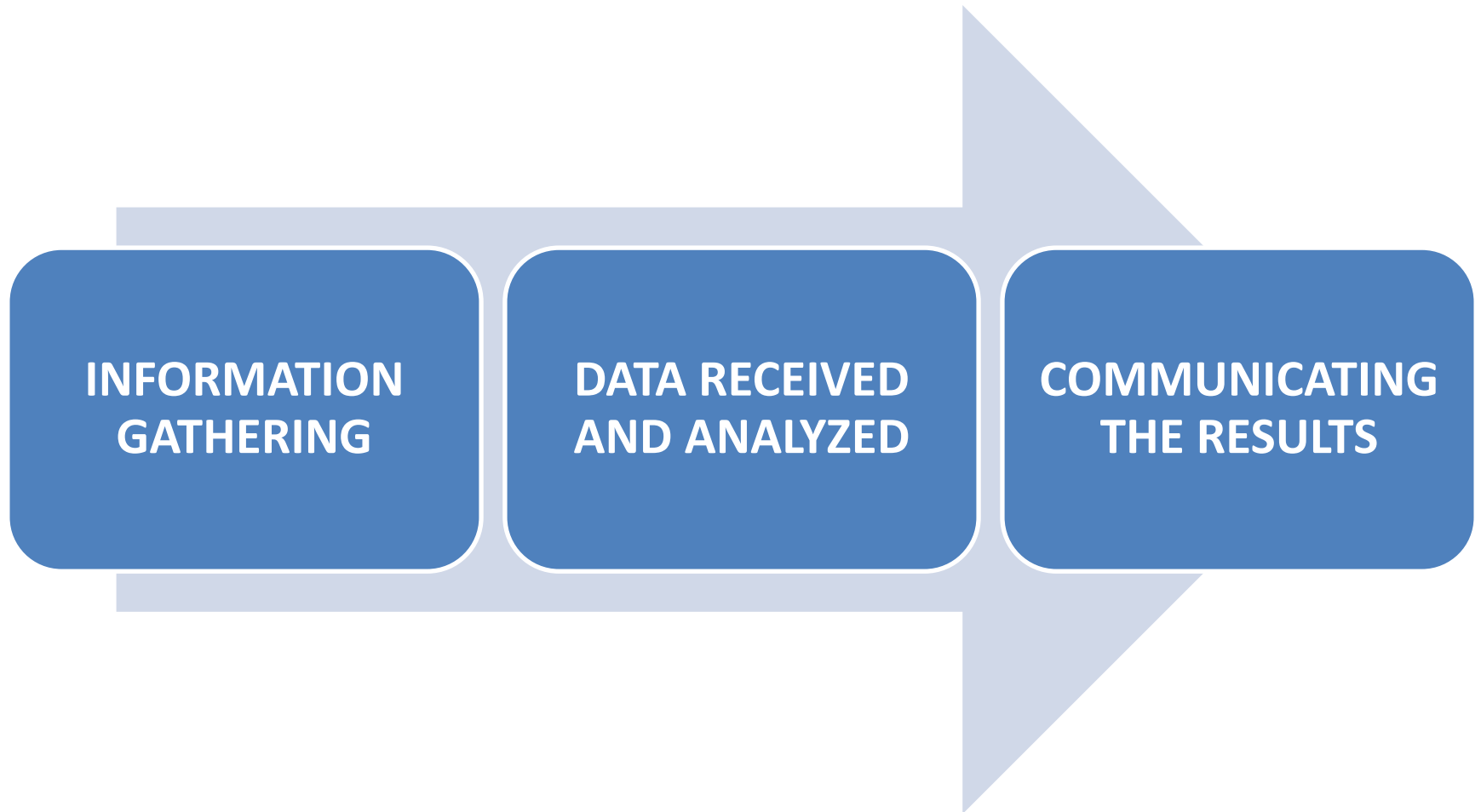
Goals

- The objective of District Business and Advisory Services (DBAS) is to create a positive culture of exceptional customer service to districts by providing support and guidance that is accurate, informative and helpful.
- In support of this objective, I developed a customer satisfaction survey which I titled “The 4 C’S Project”.
- Provides a true measure of the effectiveness of services
- Serve as a tool for immediate feedback to be used to identify areas for improvement and training.
- Serve as a decision making tool for management in the determination of allocation of resources to the various needs of the department.

The 4 C'S Project



Scope of the process



Critical Design Components

- Designed the Form in PDF format
- Web based
- Can be filled out on-line
- Used to obtain feedback after
 - phone conversations
 - Project completion
- Districts are randomly selected
- An e-mail is generated when a completed survey is returned by a district
- Allows the ability to track users who are providing feedback

Data Analysis

- Advisors will be able to retrieve the data at least once a month or once a quarter or when ever necessary
- Data is then down loaded to excel and we can extracts reports
- Reports could be sorted in different categories:

CATEGORY OF SERVICES - PAYROLL, FINANCIAL, RETIREMENT, REVENUE LIMIT ETC.

DISTRICTS

USERS

Communicating Results

- Feedback will be analyzed monthly by the DBAS Manager
- The results will be discussed at the monthly staff meetings
- The information will be used to:
 - identify staff that need additional training
 - identify the areas of training for each staff member
- Results will also be used to monitor progress and improvement.

Opportunities

- Developed my survey in a draft format
- Collaboration-interaction with all levels of staff in my department and other departments
- In the future, will work with Technology to develop this further.
- Can be used by other departments
- Can also serve as a tool to measure the performance of staff in DBAS

Opportunities-Continued

- Opened doors to endless opportunities

developed this as a single area of interest but I am currently in the process of developing training modules that will be used to train new hires and also for other staff taking on new responsibilities within the department.

- Has encouraged me to embrace and demonstrate shared values of the department.

Key Learning

- **Leadership to me is a movement**

Through this process I gained confidence, courage and conviction to deliver great service.

- **Throughout the year had the opportunity to have worked with a lot of wonderful aspiring leaders**

from all levels of the organization, where I felt connected, as being part of a big family, with shared vision, working towards a common goal.

- **Champions for Leadership has been an inspirational journey**

helped me understand and uncover the lasting rewards of investing in others, which unleashes the power and potential of an organization or an individual.