SYSTEMS AND DATA BRANCH
CUSTOMER CONSULTATION PROTOCOL

Purpose

To ensure that customers receive the information and guidance they need to strategically manage their human capital, and to develop an understanding of Human Resources support services.

Basic requirement

Establish open lines of communication to ensure trust and mutual understanding

Preparation for a meeting

Review the organizational structure and other available data.

Talk with other CP staff members to determine underlying issues and historical patterns.

Learn the customer's concerns and prepare to address them. Consider other issues/concerns which may not have been specifically stated, but which have bearing on the decision making process.

At the meeting

As needed, bring other CP staff members to provide "one-stop shopping." (If you have prepared, you'll know whom to bring.)

With the customer, define the purpose and scope of the issue. Try to determine what the 'real' issue is. Develop a mutual understanding of the desired outcome.

Be flexible. Don't just say no, but suggest alternatives that will meet the customer's needs. If necessary, promise to do additional research on possible legal and regulatory options.

Be honest. Let the customer know the potential consequences of a proposed course of action.

Educate the customer on what we have done for them – number of actions, special arrangements or exceptions, problems dealt with, etc.

At the end of the meeting, summarize the issue, decision(s), and next steps.

After the meeting

Provide an e-mail or telephonic recap on what was agreed to at the meeting. (If using email, remember that this is an official record.) Copy or verbally inform the Branch Chief.

Periodically check back to keep the customer informed about our progress.

Complete agreed upon actions in a timely manner.

Inform the customer when actions requested are completed.

Repeat often