

THE NARRATIVE GUIDE

Understanding Every Question -- The Why, the How, and the Impact

VIP Day Pre-Work | City of Hollywood -- Department of Public Utilities | Be.Lead.Grow. LLC | May 2026

HOW TO USE THIS GUIDE

Who this document is designed for

This guide is the primary resource for Reading and Writing learners, people who process information most effectively through written explanation and who need to understand the why before they commit to the how. If you prefer to read before you answer, this document was built for you. If you watched the orientation video first and are now coming here for depth on specific sections, this is exactly where you belong. And if you are moving between all three resources, this guide is the one you will return to most.

If you have not yet watched the orientation video, consider starting there, it is 6 to 8 minutes and gives you the full picture before you open this document. If you are primarily a Visual or Auditory learner, use this guide selectively: come to it when a specific question feels unclear, when you want to understand what your answer will be used for, or when a section asks for information, you have not yet pulled together.

How to Navigate

This guide is designed to be read alongside the questionnaire, not before it and not instead of it. For each question, you will find three pieces of context: why the question is being asked, how having the information will be useful to your team and to the solutions we are building together, and what the impact is if the information is unavailable or unknown.

You do not need to read every entry before answering. Use this guide the way you use a reference book, turn to the sections that feel most relevant to your role, the questions where you want to understand more before committing an answer, or the places where you find yourself unsure of what depth or direction is being asked for.

Each section of this guide opens with a note called Solutions This Section Informs. This tells you directly what will be built, or refined, using the information you provide in that section. The questionnaire is not just a data-gathering exercise. It is the foundation of a design process. Your answers are the raw material for real solutions.

There are no trick questions. Every question was chosen because it serves a specific purpose in preparing for the VIP Day and in building a stronger team and department. This guide shows you the purpose behind every one of them.

SECTION 1 -- PHONE SYSTEM OVERVIEW AND DATA AVAILABILITY

HEALTHY Connection: T -- THRIVE with Efficiency and Passion | A -- ADVANCE the Culture with Innovation

Solutions This Section Informs: Reporting dashboard design, vendor data request strategy, system integration roadmap, contract review priorities, data access improvement plan

This section focuses on your phone system, how it works, who supports it, what data it captures, and how it communicates with your other systems. Understanding the infrastructure you are working within is the foundation for every recommendation that follows.

1A. Phone System Overview

Q1 | What is the name and version of your current phone system?

WHY THIS QUESTION IS BEING ASKED

Knowing the exact system and version tells us what features are theoretically available and whether the vendor's current documentation applies to your setup.

HOW HAVING THIS INFORMATION IS USEFUL

This allows Dr. Shuttlesworth to research your specific system before the VIP Day and arrive with targeted knowledge about what your team can and cannot operationalize.

WITHOUT THIS INFORMATION

Without this, the VIP Day conversation about system capabilities will be exploratory and slow rather than focused and actionable.

Q2 | Who is your primary vendor contact? Are there regularly scheduled calls? When is the next one?

WHY THIS QUESTION IS BEING ASKED

The quality of your vendor relationship directly shapes what improvements you can request, how quickly problems get resolved, and what data you can access.

HOW HAVING THIS INFORMATION IS USEFUL

If a vendor contact and call schedule exist, we can prepare targeted questions before that next call, potentially accelerating what would otherwise take months to address.

WITHOUT THIS INFORMATION

Without a direct vendor relationship, you are dependent on help desk tickets rather than an internal advocate, translating to slower response times and less customization.

Q3 | How long has this system been in use? Was there a reason for the transition?

WHY THIS QUESTION IS BEING ASKED

Understanding how long a system has been in place, and what came before it, helps us understand whether current pain points are legacy habits or genuine limitations of the new system.

HOW HAVING THIS INFORMATION IS USEFUL

If the transition was recent, there may be untapped features not yet learned. If the system has been in place for years and issues persist, they are likely structural rather than transitional.

WITHOUT THIS INFORMATION

Without this context, we cannot distinguish between a learning curve and a systemic problem -- and those require entirely different solutions.

Q4 | Are there known limitations of the current phone system that impact your team's ability to serve residents?**WHY THIS QUESTION IS BEING ASKED**

This question invites the team to name what they already know is broken or missing, validating their expertise and creating a starting point for action.

HOW HAVING THIS INFORMATION IS USEFUL

Named limitations become a prioritized action list. Some may be fixable through configuration changes, vendor requests, or workarounds, and some require escalation.

WITHOUT THIS INFORMATION

Without an honest account of limitations, the VIP Day risks addressing surface improvements while foundational problems remain unnamed.

Q5 | Is there an internal system administrator or technical contact who manages phone system access?**WHY THIS QUESTION IS BEING ASKED**

Changes to a phone system require someone with administrative access. Knowing who that person is determines who needs to be in the room when decisions are made.

HOW HAVING THIS INFORMATION IS USEFUL

If this person exists internally, they become a key implementation partner. If the role is unclear, that is a governance gap to address before any system improvement can be sustained.

WITHOUT THIS INFORMATION

Without a designated technical owner, every system improvement requires starting from scratch to find the right person, creating delays that make change fragile.

Q6 | How does your phone system communicate with your billing management system, if at all?**WHY THIS QUESTION IS BEING ASKED**

CSRs are expected to provide real-time billing information to residents but can only do that if the phone and billing systems share data in a way that is accessible during a call.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding the current integration, or its absence, tells us exactly where CSRs are being asked to work around a technological limitation rather than being supported by one. This information will directly shape the architecture of any reporting dashboard we propose and will inform the system integration recommendations made to the vendor during the next contract review.

WITHOUT THIS INFORMATION

Without this information, we risk designing solutions that assume a system integration that does not exist, creating frustration when recommendations cannot be implemented.

1B. Vendor Data Requests

Q7 | Is there a formal process to request custom reports from your vendor? What is the turnaround time?

WHY THIS QUESTION IS BEING ASKED

Data is only useful if it can be accessed. This question tells us how easy or difficult it is to get information out of the system in a usable format.

HOW HAVING THIS INFORMATION IS USEFUL

A clear process with a known turnaround time means we can begin requesting specific reports before the VIP Day and have preliminary data ready for analysis when we sit down together.

WITHOUT THIS INFORMATION

Without a known process, data requests become low-priority support tickets and needed information sits locked in a system that is technically capable of producing it.

Q8 | Are there any data requests you have already submitted that are currently pending?

WHY THIS QUESTION IS BEING ASKED

Pending requests tell us two things: what the team knows they need, and what the vendor has not yet delivered. Both are important signals.

HOW HAVING THIS INFORMATION IS USEFUL

Pending requests can be followed up on, escalated, or refined based on what the VIP Day conversation surfaces as the highest priority data needs.

WITHOUT THIS INFORMATION

Without knowing what is already pending, we risk duplicating effort or submitting the same request twice, creating confusion and further delays.

Q9 | Have any data requests been answered? Please share examples or file links.

WHY THIS QUESTION IS BEING ASKED

Fulfilled requests tell us what the system is actually capable of producing, not just what the vendor claims. Real reports are evidence.

HOW HAVING THIS INFORMATION IS USEFUL

Reviewing examples of reports that already exist allows Dr. Shuttlesworth to understand the data format, granularity, and what is currently being used (or not used) to make decisions.

WITHOUT THIS INFORMATION

Without seeing what has been produced, we work from assumption about what is available, and assumptions about data capabilities are almost always either too optimistic or too pessimistic.

Q10 | What data would you most like to have access to that you currently cannot easily retrieve?

WHY THIS QUESTION IS BEING ASKED

This question captures the gap between what exists and what is needed, a direct expression of what leadership would use to make better decisions if only they had it.

HOW HAVING THIS INFORMATION IS USEFUL

A clearly articulated wish list becomes the basis for a vendor conversation, a contract renegotiation point, or a reporting dashboard design. It transforms frustration into a feature request, and it gives us a

specification document to bring into the next vendor negotiation rather than a vague sense that the current system is inadequate.

WITHOUT THIS INFORMATION

Without this, improvements to data access will be designed around what someone outside the team thinks they need rather than what they actually do.

SECTION 2 -- CALL VOLUME AND TOP ISSUES

HEALTHY Connection: H -- HEAR with the Intention to Act | T -- THRIVE with Efficiency and Passion

Solutions This Section Informs: Staffing model recommendations, IVR and call routing activation plan, scripting priority list, KPI reporting framework, call tracking improvement plan

This section helps us understand the volume and nature of resident contacts. The data surfaced here forms the foundation for a meaningful reporting framework and reveals where training, scripting, or system improvements will have the greatest impact.

Q11 | What is the approximate average number of calls your team receives per day?

WHY THIS QUESTION IS BEING ASKED

Call volume is the baseline metric from which all staffing, scheduling, and service design decisions should flow. Without it, every operational decision is based on intuition rather than evidence.

HOW HAVING THIS INFORMATION IS USEFUL

This number anchors the conversation about whether current staffing levels are appropriate, where coverage gaps exist, and what a realistic service standard looks like given actual demand.

WITHOUT THIS INFORMATION

Without a baseline call volume figure, there is no way to measure whether interventions, new scripts, routing changes, process improvements, actually reduce the burden on the team.

Q12 | Are there specific days or times when call volume is significantly higher?

WHY THIS QUESTION IS BEING ASKED

Volume is not evenly distributed. Knowing when spikes occur allows the team to prepare differently for billing cycle days versus mid-month.

HOW HAVING THIS INFORMATION IS USEFUL

Peak volume data informs scheduling decisions, pre-call briefings, staffing coverage, and where scripting will have the most immediate impact.

WITHOUT THIS INFORMATION

Without this, staff are perpetually reacting to high-volume periods rather than anticipating and preparing for them, which increases both errors and emotional fatigue.

Q13 | How many CSRs are typically available to answer calls on a given day?**WHY THIS QUESTION IS BEING ASKED**

The ratio of calls to available staff is the most direct determinant of customer wait time, call quality, and representative wellbeing.

HOW HAVING THIS INFORMATION IS USEFUL

Comparing call volume to staffing levels reveals whether the team is perpetually understaffed, seasonally strained, or structurally mismatched -- each requiring a different solution.

WITHOUT THIS INFORMATION

Without this, any recommendation about service improvement is disconnected from the human capacity reality of the team being asked to deliver it.

Q14 | How are calls currently tracked?**WHY THIS QUESTION IS BEING ASKED**

The method of call tracking determines what data exists and in what form. A robust ticketing system produces reportable data. A manual log produces institutional memory that walks out the door when someone leaves.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding the tracking system tells us what historical data is available, how reliable it is, and whether improvements to tracking itself are a prerequisite to everything else.

WITHOUT THIS INFORMATION

Without knowing how calls are tracked, any effort to build a data-driven culture starts with an infrastructure conversation that should have happened first.

Q15 | Is the pre-tracking / IVR feature available? Is it operationalized?**WHY THIS QUESTION IS BEING ASKED**

This question references a specific idea raised during training, routing customers to a designated queue before they reach a representative. It checks whether the infrastructure to do it already exists.

HOW HAVING THIS INFORMATION IS USEFUL

If the feature is available but not operationalized, activating it could meaningfully reduce handle time, improve routing accuracy, and give CSRs context before they answer, a potentially high-impact, low-cost improvement. This becomes an immediate, actionable solution that we can propose with a specific implementation timeline rather than a long-term aspiration.

WITHOUT THIS INFORMATION

Without knowing whether this feature exists, the team might spend resources building something they already have, or miss an opportunity to dramatically improve the resident experience.

SECTION 3 -- OPERATIONAL FLOW: THE WEEKLY AND MONTHLY RHYTHM

HEALTHY Connection: T -- THRIVE with Efficiency and Passion | E -- ESTABLISH Excellence as Your Norm

Solutions This Section Informs: Weekly briefing protocol, operational calendar, formal supervision structure, script development priorities, advance communication system, data lexicon and answer database

Understanding your team's operational rhythm, daily, weekly, and monthly, is essential to building a plan that respects how your department actually works. This section connects internal processes to the resident-facing moments they create.

Q16 | When does your billing cycle run? Please describe the full timeline.

WHY THIS QUESTION IS BEING ASKED

The billing cycle is the single most predictable driver of call volume. Every milestone, meter read, bill generation, due date, late notice, generates calls.

HOW HAVING THIS INFORMATION IS USEFUL

A documented billing timeline allows the team to anticipate high-volume days, prepare specific talking points for each milestone, and communicate more effectively with confused residents.

WITHOUT THIS INFORMATION

Without this map, CSRs answer billing calls reactively, without the organizational context needed to explain the full picture to a frustrated resident.

Q17 | When do disconnections typically occur? How many accounts are affected?

WHY THIS QUESTION IS BEING ASKED

Disconnections are among the highest-stakes interactions the CS team handles, involving residents who may be vulnerable or facing hardship. Knowing when they happen and at what scale is essential to preparation.

HOW HAVING THIS INFORMATION IS USEFUL

Knowing that disconnections happen on a specific day allows the team to staff appropriately, brief representatives in advance, and have escalation protocols and community resource information ready.

WITHOUT THIS INFORMATION

Without this information, disconnection days are handled as crises rather than as predictable, plannable moments that can be managed with compassion and consistency.

Q18 | When do reconnections typically happen, and how long does the process take?

WHY THIS QUESTION IS BEING ASKED

After a disconnection, the reconnection process is the team's first opportunity to rebuild trust with a resident. The speed and clarity of that process determines whether a difficult interaction ends in resolution or further frustration.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding the reconnection timeline allows the team to set accurate expectations with residents rather than offering vague timeframes that erode trust when not met.

WITHOUT THIS INFORMATION

Without documented reconnection timelines, CSRs make promises they cannot guarantee, damaging the team's credibility even when the desire to help is genuine.

Q19 | Are there other monthly events that predictably impact call volume?**WHY THIS QUESTION IS BEING ASKED**

Beyond the billing cycle, other predictable events (e.g. system rollouts, policy changes, community mailings) generate resident inquiries that are often known to other departments but not communicated to CS.

HOW HAVING THIS INFORMATION IS USEFUL

Documenting these events creates an operational calendar that allows the team to prepare briefings, adjust staffing, and develop talking points before the calls begin rather than improvising under pressure.

WITHOUT THIS INFORMATION

Without this calendar, the CS team is always the last to know about events that directly affect resident behavior -- a pattern that breeds fatigue and erodes confidence.

Q20 | How far in advance does your team learn about upcoming high-volume events?**WHY THIS QUESTION IS BEING ASKED**

Preparation time is a form of respect. When CS receives advance notice of events likely to generate calls, they can prepare. When they do not, they absorb the shock, operationally and emotionally.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding current lead time tells us whether this is a communication failure, a structural gap, or an organizational culture issue that needs to be addressed at the interdepartmental level.

WITHOUT THIS INFORMATION

Without knowing how much notice the team typically receives, we cannot design a realistic advance communication protocol, and the team will continue to be unprepared for predictable events.

Q21 | Is there a current process for briefing CSRs before high-volume or complex call periods?**WHY THIS QUESTION IS BEING ASKED**

Morning huddles, supervisor messages, and pre-shift communications are the most direct mechanism for transferring knowledge from leadership to frontline staff before a shift begins.

HOW HAVING THIS INFORMATION IS USEFUL

If a briefing process exists, we can refine and strengthen it. If it does not, establishing one becomes a VIP Day recommendation with a clear implementation path.

WITHOUT THIS INFORMATION

Without a briefing process, every representative arrives at their desk with the same level of information regardless of what happened yesterday, what is expected today, or what the team needs to know right now.

Q22 | When a policy, system change, or billing issue affects residents, how does that information reach your CSRs?**WHY THIS QUESTION IS BEING ASKED**

The speed and reliability of information transfer from decision-makers to frontline staff is a critical determinant of service quality. If CSRs learn about policy changes from confused residents rather than their own leadership, that is a structural failure.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding the current communication channel allows us to evaluate whether it is timely, reliable, and accessible to all staff regardless of shift.

WITHOUT THIS INFORMATION

Without a clear and consistent channel, policy information reaches staff unevenly, creating inconsistency in how the same question gets answered by different representatives on the same day.

Q23 | When do formal team meetings and individual supervision sessions take place? Do they include space for guidance and rectification?**WHY THIS QUESTION IS BEING ASKED**

Supervision is not just performance management. Regular group meetings build shared understanding. Individual supervision sessions create space for guidance, growth, and correction before small issues become significant ones.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding the current supervision structure tells us whether the team has adequate leadership presence, and whether that presence creates space for both accountability and care.

WITHOUT THIS INFORMATION

Without structured supervision, the team is left to self-manage without the guidance, recognition, and course-correction that every frontline team needs to stay motivated and consistent.

Q24 | What areas of customer interaction most need a scripted response? Have any scripts been attempted since training?**WHY THIS QUESTION IS BEING ASKED**

This question was redesigned because the training conversation revealed that no scripts currently exist. Rather than asking about something absent, it asks the team to imagine and propose what would help them most.

HOW HAVING THIS INFORMATION IS USEFUL

A team-generated list of priority scripting areas is more likely to be used and adapted over time than one imposed from outside -- because it reflects the actual calls the team struggles with. The areas named here become the first scripts we build together during and after the VIP Day, starting with the highest-volume and highest-stress call types.

WITHOUT THIS INFORMATION

Without identified priority areas, script development begins from scratch and risks addressing less urgent needs while more common, difficult interactions continue to go unscripted.

Q25 | Has any progress been made toward a data lexicon or shared answer database since training?**WHY THIS QUESTION IS BEING ASKED**

The concept of a shared database of standard answers was introduced during training as a way to reduce variability in how different CSRs answer the same question. This question checks whether any progress has been made.

HOW HAVING THIS INFORMATION IS USEFUL

Even informal progress, a shared document, a notes folder, is worth documenting and building on. Any progress already made becomes the foundation rather than the starting point, and the gaps identified here become the first tasks of the post-VIP Day work plan rather than open-ended aspirations.

WITHOUT THIS INFORMATION

Without a shared repository, every CSR answers common questions differently based on individual experience and interpretation, creating inconsistency that residents notice and complain about.

SECTION 4 -- INTERDEPARTMENTAL IMPACT AND WORKFLOWS

HEALTHY Connection: A -- ADVANCE the Culture with Innovation | L -- LEAD with Vulnerability and Joy

Solutions This Section Informs: Interdepartmental engagement sequence for Phase 2, handoff documentation and SOP development, escalation protocol redesign, Phase 2 department introduction plan

Customer service outcomes are shaped by decisions made in other departments. This section maps those interdependencies, naming the relationships, the friction points, and the opportunities for improvement that sit at the intersection of your work and theirs.

Q26 | Which departments does your CS team interact with most frequently to resolve a customer issue?**WHY THIS QUESTION IS BEING ASKED**

This question maps the actual web of interdependence that the CS team operates within, telling us which departments are most involved in the outcomes the team is responsible for.

HOW HAVING THIS INFORMATION IS USEFUL

The departments named here become the priority list for the interdepartmental expansion of this engagement. Starting with the relationships that already exist and are already strained is more effective than building new ones from scratch.

WITHOUT THIS INFORMATION

Without this map, interdepartmental improvement efforts are applied broadly and dilute their impact rather than targeting the connections that most directly shape the resident experience.

Q27 | For each department named, what is the typical turnaround time for a response?**WHY THIS QUESTION IS BEING ASKED**

The speed at which other departments respond to CS requests determines how quickly residents get resolution. Slow turnaround times translate directly into follow-up calls and eroded trust.

HOW HAVING THIS INFORMATION IS USEFUL

Documented turnaround times create a baseline for measurement and a basis for conversation with those departments about what is realistic and what needs to improve.

WITHOUT THIS INFORMATION

Without turnaround time data, CS cannot set accurate expectations with residents and cannot make the case to other departments that their response time is creating downstream dissatisfaction.

Q28 | Are there handoff processes that are currently undocumented or inconsistently followed?**WHY THIS QUESTION IS BEING ASKED**

Informal workarounds are a form of institutional knowledge that exists despite the absence of formal process. They work until the person who carries them leaves, and then they fail visibly.

HOW HAVING THIS INFORMATION IS USEFUL

Naming undocumented handoffs allows the VIP Day to produce simple documentation that protects the team from knowledge loss and creates the consistency needed for accountability.

WITHOUT THIS INFORMATION

Without documentation, handoff quality is entirely dependent on individual relationships and institutional memory, both of which are fragile and not transferable to new staff.

Q29 | What is the one interdepartmental process that, if improved, would most reduce call volume?**WHY THIS QUESTION IS BEING ASKED**

This is a prioritization question that asks the team to think strategically about which single improvement would have the most immediate, measurable impact on their daily reality.

HOW HAVING THIS INFORMATION IS USEFUL

The answer to this question becomes the first recommendation of the interdepartmental expansion, giving the team a visible victory early in the broader engagement that builds momentum and trust.

WITHOUT THIS INFORMATION

Without this prioritization, the interdepartmental work risks spreading attention across too many relationships simultaneously rather than achieving one clear, visible improvement first.

Q30 | From the resident's perspective, what does a successful resolution look like?**WHY THIS QUESTION IS BEING ASKED**

This question shifts the frame from operational metrics to human experience, asking the team to think from the resident's perspective, which is ultimately the only metric that matters.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding what residents most value in a resolution allows the team to align their service approach with what actually builds trust rather than what is easiest to measure internally.

WITHOUT THIS INFORMATION

Without this perspective, improvements focus on what is measurable from the inside (handle time, calls per day) rather than what is meaningful from the outside (whether the resident hung up feeling helped).

Q31 | What is the most common resident misunderstanding, and why does it keep recurring?

WHY THIS QUESTION IS BEING ASKED

Recurring misunderstandings are not resident failures. They are communication design failures. If the same question is being asked repeatedly, something about the billing statement, policy, or communication is consistently unclear.

HOW HAVING THIS INFORMATION IS USEFUL

Naming the most common misunderstanding points directly to where a scripted explanation, a revised bill format, or a clearer policy communication could eliminate a significant category of calls.

WITHOUT THIS INFORMATION

Without identifying recurring misunderstandings, each confused resident call is treated as an individual problem rather than as a symptom of a systemic communication gap.

Q32 | When a resident escalates to a commissioner or the Mayor's office, what is the typical reason?

WHY THIS QUESTION IS BEING ASKED

An escalation to a commissioner is a signal that the resident has lost confidence in the department's ability to resolve their concern, the highest-cost type of failure in a public utility setting.

HOW HAVING THIS INFORMATION IS USEFUL

Identifying the typical reasons for escalation reveals where the current process breaks down, whether at first contact, in the escalation protocol within CS, or in the policy itself.

WITHOUT THIS INFORMATION

Without this data, escalations continue to be managed one at a time rather than traced to a systemic root cause that, if addressed, would prevent most of them from occurring.

SECTION 5 -- COMMUNITY RESOURCES AND FINANCIAL RELIEF

HEALTHY Connection: H -- HONOR Everyone's Journey | H -- HEAR with the Intention to Act

Solutions This Section Informs: Standardized resident referral protocol, CSR permission and training framework, resident resource reference list, policy review and recommendation if restrictions exist

This section addresses a dimension of customer service that is often overlooked, the humanity of the interaction. When a resident calls in distress about a bill they cannot pay, what happens next? This section explores what is currently available and what is possible.

Q33 | Does your department provide information to residents about financial relief organizations when they call about inability to pay?

WHY THIS QUESTION IS BEING ASKED

Many residents calling in distress are not calling because they do not want to pay, they cannot. The difference between a department that provides a referral and one that does not is the difference between a resident who finds help and one who faces disconnection alone.

HOW HAVING THIS INFORMATION IS USEFUL

If referrals are currently being made informally, documenting which organizations and in what circumstances produces a standardized referral list that every CSR follows consistently, regardless of who picks up the call. If referrals are not being made, this conversation becomes the basis for a new practice that can be implemented immediately, without requiring policy change, if no prohibiting policy exists.

WITHOUT THIS INFORMATION

Without this information, some residents receive referrals based on which representative answers the phone rather than as a consistent department practice, meaning resident access to support is determined by chance.

Q34 | Is there a policy that prohibits referrals to financial relief organizations? Please provide a copy if so.

WHY THIS QUESTION IS BEING ASKED

Some municipalities have explicit or implicit policies about what information can be shared with residents during a service call. Knowing whether such a policy exists is essential before recommending any change to referral practices.

HOW HAVING THIS INFORMATION IS USEFUL

If a policy exists, it can be reviewed and potentially revised through the appropriate channels. If none exists, the absence of referral practice is a gap that can be filled immediately without requiring policy change.

WITHOUT THIS INFORMATION

Without this answer, a recommendation to begin making referrals could inadvertently violate a policy, creating a compliance issue rather than a service improvement.

Q35 | Are CSRs comfortable discussing financial hardship with residents, or is it typically escalated?**WHY THIS QUESTION IS BEING ASKED**

Financial hardship conversations require a different skill set than technical billing inquiries. Not every CSR has been trained for this -- and not every CSR feels they have permission to engage at that level.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding the current comfort level tells us whether training, permission-setting, or scripting is the right intervention, or all three.

WITHOUT THIS INFORMATION

Without this information, a referral practice can be put in place theoretically while failing in practice because the people responsible for delivering it are not equipped or authorized to do so.

SECTION 6 -- EMPLOYEE ORIENTATION AND ONBOARDING

HEALTHY Connection: H -- HONOR Everyone's Journey | E -- ESTABLISH Excellence as Your Norm

Solutions This Section Informs: Onboarding redesign proposal, new employee orientation guide, quality assurance structure and call review schedule, system training redesign, white-labeled onboarding materials for future use

What you build during the VIP Day should eventually live in how you welcome every new team member. This section examines how new employees currently learn to do this work, and where that process can be strengthened to protect the investment you are making now.

Q36 | When a new CSR is hired, what does their first day look like?**WHY THIS QUESTION IS BEING ASKED**

The first day sets the cultural tone for a new employee's entire relationship with the team. It communicates, without words, how much the organization values the person who has just joined.

HOW HAVING THIS INFORMATION IS USEFUL

A detailed first-day description reveals whether onboarding is intentional and welcoming or improvised and stressful, giving us the starting point for redesign.

WITHOUT THIS INFORMATION

Without understanding the current first-day experience, any onboarding improvement will be designed around assumption rather than the actual experience new staff are having.

Q37 | How long does it typically take before a new employee is handling calls independently?**WHY THIS QUESTION IS BEING ASKED**

The length of time before a new employee handles calls alone tells us whether the onboarding process is building genuine competence or rushing new staff into situations they are not ready for.

HOW HAVING THIS INFORMATION IS USEFUL

This timeline, compared with call quality data and new employee retention, tells us whether the current progression is working, or creating the conditions for early burnout and mistakes.

WITHOUT THIS INFORMATION

Without this data point, new employees either stay in training too long (wasting resources) or are released too early (creating quality problems and increasing their stress).

Q38 | Is there a formal onboarding checklist, guide, or manual currently in use?**WHY THIS QUESTION IS BEING ASKED**

A formal onboarding document is the difference between a consistent experience for every new hire and an experience that varies based on who happens to be available to do the training that week.

HOW HAVING THIS INFORMATION IS USEFUL

An existing document becomes the starting point for the onboarding redesign, its gaps tell us exactly what to build, and building from something real is faster and more grounded than starting from scratch. If no document currently exists, creating a simple, practical onboarding guide becomes the most immediately useful deliverable to come out of the VIP Day.

WITHOUT THIS INFORMATION

Without a documented onboarding process, institutional knowledge is carried by individuals rather than embedded in a system, which means every departure takes onboarding knowledge with it.

Q39 | Who is primarily responsible for onboarding new team members?**WHY THIS QUESTION IS BEING ASKED**

Accountability for onboarding is as important as the content of onboarding. If responsibility is unclear or shared without coordination, the experience is fragmented.

HOW HAVING THIS INFORMATION IS USEFUL

Naming a clear owner allows us to build a realistic process around what that person is actually equipped and authorized to do.

WITHOUT THIS INFORMATION

Without a clear owner, onboarding quality becomes inconsistent and improvement efforts have no single champion to drive and sustain them.

Q40 | What do new employees typically say they wish they had known sooner?**WHY THIS QUESTION IS BEING ASKED**

This question bypasses official process descriptions and gets to experiential truth. What new employees say they wished they knew sooner is almost always the thing most urgently missing from onboarding.

HOW HAVING THIS INFORMATION IS USEFUL

The honest answers here generate the most immediately actionable onboarding improvements because they come from people who just lived the experience.

WITHOUT THIS INFORMATION

Without this input, onboarding improvements are designed from the outside looking in, which often results in elegant documentation that does not address the things that actually trip new staff up.

Q41 | Is there a formal training process for the phone and billing systems? How is it delivered?**WHY THIS QUESTION IS BEING ASKED**

System training is the most critical component of early effectiveness for a new CSR. If inadequate or inconsistent, every other aspect of onboarding is undermined by the inability to navigate the basic tools of the job.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding whether system training is structured or informal determines what improvements are possible and what resources already exist.

WITHOUT THIS INFORMATION

Without understanding the current system training, new CSRs learn their tools by trial and error, increasing handle time, reducing accuracy, and damaging resident confidence early in employment.

Q42 | How long does system training typically take before a new employee can navigate independently?**WHY THIS QUESTION IS BEING ASKED**

System fluency develops over time. This question tells us how long it realistically takes before a new employee can use the system without significant assistance.

HOW HAVING THIS INFORMATION IS USEFUL

If system navigation is taking too long to develop, that points to gaps in the training itself rather than in the learner, suggesting a redesign of how system training is delivered.

WITHOUT THIS INFORMATION

Without knowing this timeline, staffing models during onboarding will not account for the reduced capacity of new employees, creating coverage gaps and increased burden on experienced staff.

Q43 | Are there system features that even experienced staff find confusing or inconsistently applied?**WHY THIS QUESTION IS BEING ASKED**

When experienced employees still struggle with certain features, the problem is the design or documentation of the feature, not the user. These friction points compound every day.

HOW HAVING THIS INFORMATION IS USEFUL

Named friction points become specific items for a vendor conversation, requesting better documentation, configuration changes, or training support for the features most commonly misused.

WITHOUT THIS INFORMATION

Without identifying these chronic confusion points, every new employee goes through the same frustrating learning curve -- and the problem perpetuates itself indefinitely.

Q44 | Is there any reference material (e.g. cheat sheets, SOPs, guides) that staff use for common tasks?**WHY THIS QUESTION IS BEING ASKED**

Reference materials are the practical tools that bridge the gap between training and independent performance. Their presence or absence signals how much the organization has invested in making the job doable.

HOW HAVING THIS INFORMATION IS USEFUL

Existing materials can be evaluated, updated, and formalized. The best ones become the foundation of onboarding documentation and the basis for white-labeled materials in subsequent phases.

WITHOUT THIS INFORMATION

Without reference materials, every CSR builds their own informal library of notes and workarounds, creating inconsistency in practice and a knowledge base that is entirely personal rather than institutional.

Q45 | What quality assurance or call review is conducted during the onboarding period? At what intervals?**WHY THIS QUESTION IS BEING ASKED**

Call review, performance check-ins at defined intervals, and structured feedback are the mechanisms by which a new employee learns whether they are on the right track. Without them, a new employee may be developing bad habits for weeks before anyone intervenes.

HOW HAVING THIS INFORMATION IS USEFUL

A documented QA process creates accountability on both sides, the employee knows what is expected and when, and the supervisor has a defined moment to give feedback.

WITHOUT THIS INFORMATION

Without quality assurance touchpoints during onboarding, problems that could be corrected early become embedded habits, which are harder and more costly to address later.

Q46 | At what point is a new employee's performance first formally documented?**WHY THIS QUESTION IS BEING ASKED**

The timing of the first formal performance documentation tells us whether the organization holds itself accountable to developing new staff or waits for problems to surface before engaging.

HOW HAVING THIS INFORMATION IS USEFUL

If the first formal review happens too late in the onboarding period, early struggles go undocumented and unsupported. If it happens too early, it may capture natural confusion rather than genuine performance patterns.

WITHOUT THIS INFORMATION

Without a defined first documentation point, performance management begins reactively, in response to problems rather than as a developmental practice from the start of employment.

Q47 | What is the most significant gap in your current onboarding process?**WHY THIS QUESTION IS BEING ASKED**

This question asks for an honest self-assessment from the people who know the onboarding process best. It is the most direct path to identifying the single improvement that would have the most impact.

HOW HAVING THIS INFORMATION IS USEFUL

The answer anchors the onboarding redesign recommendation from the VIP Day, giving it credibility because it comes from inside the team rather than from outside.

WITHOUT THIS INFORMATION

Without this candid assessment, onboarding improvements will address symptoms rather than root causes, and the fundamental gap will continue to shape the experience of every new hire.

Q48 | Is customer service philosophy or communication standards covered in onboarding? If yes, how?**WHY THIS QUESTION IS BEING ASKED**

Skill training teaches someone how to navigate a system. Philosophy training teaches someone why the work matters and what it means to serve a resident with care. Without the second, the first produces technically competent but relationally flat interactions.

HOW HAVING THIS INFORMATION IS USEFUL

Understanding whether and how service philosophy is covered tells us whether the HEALTHY framework and VIP Day outcomes can be embedded in onboarding as a structural practice rather than a one-time training event.

WITHOUT THIS INFORMATION

Without a philosophy component in onboarding, the values introduced in the training are not reinforced for new staff, and the culture improvement of this engagement will have a limited shelf life.

Q49 | If you could redesign onboarding from scratch with no constraints, what would the first 30 days look like?**WHY THIS QUESTION IS BEING ASKED**

This question invites the team to dream without constraint, which often surfaces the most practical and meaningful ideas, because they come from people who know exactly what is missing from their own experience.

HOW HAVING THIS INFORMATION IS USEFUL

The answers here become the first draft of a redesigned onboarding proposal, one that is grounded in the team's actual wisdom rather than a generic HR best practice. This response, combined with the answers to Q36 through Q48, will produce a complete onboarding redesign document that can be implemented incrementally and eventually incorporated into the orientation materials developed for all future staff.

WITHOUT THIS INFORMATION

Without this generative thinking, onboarding will be improved incrementally rather than reimaged, which may not be sufficient to address a gap that is structurally embedded in the current design.

SECTION 7 -- TEAM VOICE AND OPEN REFLECTION

HEALTHY Connection: H -- HEAR with the Intention to Act | Y -- YIELD to the Awesomeness of YOU

Solutions This Section Informs: VIP Day agenda sequencing and facilitation approach, individual leader support plan, identification of what needs more time before decisions are made, co-creation of Phase 2 scope

These final questions are intentionally open. They exist to surface what no structured section could fully capture the internal experience of each leader preparing for the VIP Day. The three answers per question (one from each leader) create a comparative picture that will shape the facilitation of the day itself.

Q50 | What is the one thing you most want to accomplish during the VIP Day?

WHY THIS QUESTION IS BEING ASKED

This question ensures the VIP Day agenda is shaped by what the three leaders actually need, and not by what an outside facilitator assumes. It is the first act of co-creation in the session.

HOW HAVING THIS INFORMATION IS USEFUL

When all three answers are compared, alignment becomes visible, as do the tensions and differences that need to be navigated carefully during the day.

WITHOUT THIS INFORMATION

Without stated intentions, the VIP Day risks being facilitated toward outcomes that do not align with what leadership came to accomplish, leaving participants feeling that the time was not used for what mattered most.

Q51 | What are you most concerned about going into the VIP Day?

WHY THIS QUESTION IS BEING ASKED

Named concerns can be addressed. Unnamed concerns become the undercurrent of a session, the thing everyone is thinking about but no one is saying, which makes genuine progress harder to reach.

HOW HAVING THIS INFORMATION IS USEFUL

Knowing what each leader is concerned about allows Dr. Shuttlesworth to sequence conversations strategically, surface tensions before they derail productive moments, and create the psychological safety needed for honest engagement.

WITHOUT THIS INFORMATION

Without named concerns, the VIP Day operates on the surface of what each person is comfortable saying rather than reaching the level of honesty where real alignment can happen.

Q52 | What question keeps coming up for you that you cannot yet answer?

WHY THIS QUESTION IS BEING ASKED

Unanswered questions are diagnostic. They reveal where the team is stuck, and often, where the most meaningful work of the VIP Day can happen.

HOW HAVING THIS INFORMATION IS USEFUL

Three leaders with three different unanswered questions may find that their questions are connected, that answering one would illuminate the others, or that they share a common root cause worth examining together.

WITHOUT THIS INFORMATION

Without articulating these questions, the VIP Day will address the questions that are easy to ask aloud in a group, which are rarely the most important ones.

Q53 | Is there anything Dr. Shuttlesworth needs to know before she arrives?**WHY THIS QUESTION IS BEING ASKED**

This is an invitation to share context, history, relationship dynamics, or background information that would help an outside facilitator understand what she is walking into, beyond what the other sections have captured.

HOW HAVING THIS INFORMATION IS USEFUL

This information shapes how the VIP Day is facilitated (e.g. the tone, the pacing, the sequence of conversations), and the moments where additional care or directness is needed.

WITHOUT THIS INFORMATION

Without this context, a facilitator enters the room with competence but without full situational awareness, meaning the first portion of the day may be spent learning things that could have been known in advance.

Q54 | Is there anything you are not yet ready to discuss or act on during the VIP Day?**WHY THIS QUESTION IS BEING ASKED**

Naming what is not ready to be discussed is not avoidance, it is wisdom. It prevents the VIP Day from inadvertently opening conversations that the team does not yet have the trust, information, or safety to resolve productively.

HOW HAVING THIS INFORMATION IS USEFUL

Knowing what is off the table, for now, allows the facilitator to sequence the day in a way that builds toward those harder conversations rather than stumbling into them unprepared.

WITHOUT THIS INFORMATION

Without named limits, the VIP Day risks pushing into territory that is not ready to be explored, which can damage trust, shut down openness, and undermine the progress made in every other conversation that day.

Every question matters. Every answer is useful. Every gap is information.

If a piece of data is unavailable, saying so tells us something important about what the department knows, and what it still needs to know. Your honest, complete responses make the VIP Day more effective, more targeted, and more likely to produce outcomes that last.

Honor people. Align leadership. Strengthen systems. Learn from data. Thrive together.

