



CUSTOMER SERVICE Culture of Excellence

This module will outline the expectations and standards for customer service at Lifeworks.

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Our Brand

Everything we do starts with our vision and mission:
We envision a world where disability inclusion is the standard.
Our mission is to be the partner of choice in advancing disability inclusion.
Lifeworks bridges the gap between people with disabilities and our communities by offering self-determined services, providing inclusive educational opportunities, and advocating for change.

Lifeworks employees have a variety of customers including employers, clients, family members, social workers, case managers, donors, grantors, vendors and co-workers. The customer service goal for Lifeworks is that we deliver a world-class customer experience. Our customers will recognize us, remember us, and will share their great experiences with others.

Our Values

You Lead the Way – We Listen: We honor choice and pursue opportunities with community at the heart of our work.

Together, We Break Down Barriers: We seek diverse perspectives, advance accessibility, and encourage a sense of belonging for all.

We Focus on Impact: We hold ourselves to the highest standards. We share expertise and collaborate to find solutions that address the whole picture.

We Reinvent What's Possible: We take chances and welcome the unknown. We learn from the past and lean into the future.

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Our Work Culture

We are genuine to all we encounter and eager to provide world-class support — because Lifeworks believes all people deserve the best.

Lifeworks employees embody these qualities: Genuine, Driven, Passionate, Warm, Supportive, Authentic, Honest, Action-oriented, Collaborative, Resourceful, Confident, Congenial, Respectful, Sincere, Proud.

The field of disability services has evolved significantly, and Lifeworks has always been at the forefront of this progression. Since our founding in 1965, we have grown into a leader in providing world-class services for people with disabilities, their families, and communities. Our journey reflects our unwavering commitment to innovation and excellence, ensuring we meet the diverse needs of our community by listening to our partners with disabilities.

How we interact with customers and represent the Lifeworks brand creates emotional connections. These connections influence how people perceive Lifeworks. We want everyone to associate Lifeworks with trust, support, and quality. Achieving this requires consistent, authentic communication that resonates with our audience and reinforces our values and mission.

As part of the Lifeworks team, you are a brand ambassador. In every interaction - with clients, partners, or the community - you represent Lifeworks. Everything we do and say, from marketing campaigns to customer service interactions, must align with our core values and strategic objectives. By maintaining this standard, we can build a cohesive and strong presence that enhances our reputation and fosters deeper connections with the communities we partner with. By understanding and embracing our customers service fundamentals, each of us at Lifeworks can represent the organization effectively and authentically.

Open communication, trust, transparency, acknowledgment.

Lifeworks is a large organization that is comprised of many different teams and departments. Each team and department is made up of many different individuals, each person brings their own strengths, ideas, and creative forces to the workplace. The voice, the feel and the look of Lifeworks is expected to have a consistent base among all the different work groups. One that is highly collaborative, community-centric, diverse, and focused on positive impact, where employees are empowered to take initiative, and actively seek different perspectives. All working together to achieve meaningful outcomes while embracing innovation and a willingness to explore new approaches.

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There is a lot to think about when providing good customer service. It may help to remember that there are some basic needs that all customers have and basic rules to follow when providing service to people.

What do customers expect?

1. Personalization: Tailoring interactions to individual customer needs and preferences.
2. Promptness: Responding to inquiries quickly and efficiently.
3. Empathy: Demonstrating genuine understanding and concern for the customer's situation.
4. Proactive approach: Anticipating customer needs and addressing potential issues before they arise.
5. Consistency: High quality communication regardless of who is delivering it or the delivery method.

Each of us can put our individual stamp of excellence on our work;

- Be friendly and welcoming in your expressions, gestures, and tone when answering the phone, in person and in virtual meetings. Refer to the Employee Handbook for the current Hybrid Meeting Policy details.
- Engage in discussions, actively listening
- Say thank you and telling each other when we really appreciate the work a co-worker has done
- Be open to feedback, integrate feedback, so we can learn other perspectives and continue to improve our service.
- Rely on our full base of knowledge and own lived experiences to shape our high personal standards for inclusion and customer service
- Be persistent and consistent in maximizing our resources, tools and programs
- Meet our commitments to customers and peers regarding services, timelines, and goals

The possibilities for personal and creative customer service are endless! When Lifeworks stands out among competitors, it's because of excellent customer service that begins and ends with every employee at Lifeworks.

We can be a trusted partner and exceptional service provider for everyone. We will provide the highest level of service and expertise for all of our offerings. This does not mean that we can be everything to everyone. Sometimes providing a the best customer experience is letting the customer know we are not able to provide a specific type of service and making recommendations for other options.

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The Voice of Lifeworks

“Thank you for calling Lifeworks. This is _____. How may I help you?”

Each time an employee has an encounter with a customer, coworker, or partner we want them to know that they are connected to someone at Lifeworks and have a personal connection they can rely on – you!

Every time you pick up the phone or greet someone in person, you have an opportunity to begin building a relationship. First impressions are quick and long-lasting, Lifeworks expects employees to provide a great first impression and a lasting partnership.

The Feel of Lifeworks

“Working with Lifeworks feels really good.”

We are inclusive and accommodating to the abilities, needs and goals of others. Customers feeling good about Lifeworks occurs when they have their needs met and feel understood by the people who work for Lifeworks. Customers want to know what Lifeworks stands for, that they have support within Lifeworks and can trust that we are working with their best interests in mind. This relationship building strengthens by providing easy access to knowledgeable and resourceful staff, using a friendly tone of voice, greeting everyone with a smile, and quick and easy resolution to challenging situations.

By providing thoughtful and clear expectations, meeting our commitments, and holding each other accountable to fully utilizing systems/process/standards we will achieve industry leading outcomes. We have a “say yes” orientation and also understand that, at times, we must say no.

The Look of Lifeworks

“That’s Lifeworks! I’d know Lifeworks anywhere.”

The look of Lifeworks is developed through our brand guidelines. It’s a lot of little details that add up to one big picture of our organization. Our look is the colors we use in our advertising, in our facilities, and on our vehicles. It’s our email signatures and how we talk about what it is we do at Lifeworks. It’s how the employees dress and act in in virtual meetings, in the centers, and at our job sites,

Being recognized as Lifeworks in a group of competitors is an advantage that allows us to provide jobs for clients, receive donations, receive grants, enroll clients in services and attract good employees. The look of Lifeworks is also impacted by the accessibility and upkeep of

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our facilities. Inclusive design, clean lobbies and entryways as well as neat program rooms, cubicles, and offices all enhance our professional demeanor.

Standards for Professional Communication at Lifeworks

What exactly do we mean by professionalism? We have professional standards in our employee handbook. Refer to the Employee Handbook for full details of our Professionalism Standards. When people feel that they are the most important person to you in that moment, they will want to talk with you again...and again!

Never give out someone's personal information or direct phone number without that person's consent.

Communicating in Person

Communicating with people in person presents an incredible opportunity to make a great connection. We want to make sure that visitors, volunteers, and Lifeworks employees feel welcome when they come through any Lifeworks door.

Smile, proactively greet and welcome others. The first time you meet someone is when you make an impression on them that they will remember for a long time.

Include important details when you introduce yourself, "I am Sue Jones from Lifeworks." Be prepared to explain what Lifeworks is; many people will ask. You might say "Lifeworks is a nonprofit organization that is all about disability inclusion," or "Lifeworks advances disability inclusion by partnering with people with disabilities in the community and in their homes." Avoid jargon and acronyms. *Refer to the brand guidelines for additional information on how to explain Lifeworks.*

Introduce all visitors and partners to people in the room, at the center or job site, etc. Make them feel included. If you are doing an activity, explain what you're currently doing and invite them to be a part of the activity. People return to places where they were made to feel good about their experience. If people feel welcome, they will come back. A relationship, a new job, or some other opportunity may develop.

Offer your business card to people in the community and on the job site.

Communicating on the Phone

Use a positive, upbeat tone of voice when answering the phone. When you smile, it's reflected in your voice. "Thank you for calling Lifeworks. This is _____. How may I help you?"

If the requested person isn't available give the caller the option of leaving a voicemail message, redirecting their call to someone else who may be able to help them, tell them where they can find more information on our website/app, or provide the email contact information for the person they are trying to reach.

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If the person requested isn't familiar to you, ask some qualifying questions. What department do they work in? Where did you meet them or get their contact information? What is your primary question related to? Can I connect you with someone else?

When leaving a voicemail message, make it detailed enough for the person to understand the purpose of the call and what they need to do in response. If you want them to call back, leave times when you can be reached and always leave your phone number and email contact information.

If you are with a group and receive a call that you must take, excuse yourself from the group and take the call in another area. Whenever possible turn off your phone and check your messages during breaks or after the meeting.

Communicating Virtually

- When using Zoom or other virtual meeting platforms for groups, Lifeworks employees' virtual presence should meet the same standards as our in-person meetings, with a few virtual additions:
- On-camera presence required for interpersonal discussions and conversations to simulate in-person interactions, audio presence only for information sharing without group discussion is permitted.
- Eating and drinking may be permitted, if not disruptive to the meeting process.
- On-camera background should be tidy and organized or altered using a background filter, such as blurring.
- Harassing, discriminatory, religious, political, or derogatory on-camera background content is prohibited.

Communicating in Writing

- Take care when writing electronic and handwritten messages. Use correct grammar, punctuation, and format. Refer to the brand guidelines for additional information on the proper writing and editorial requirements for written communications.
- Send thank-you notes; they leave a lasting impression. Thank people for the little things: for an invitation to a retirement party, for making a client feel welcome at a coffee shop, or for suggesting Lifeworks for a project.
- Lifeworks stationery and branded note cards, are available to all staff at the Main Office.
- Help your clients send thank-you notes.

Communicating When We Are Not Available

There will be times when we aren't available to customers, it is important that we are consistent and clear about when we will be back in touch with them. Any Lifeworks phone number or email box assigned to you should have an up-to-date message regarding when a request or question will be followed up on. Please use the following scripts for your messages:

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- Voice Mail Standards for all mobile and desk phones

“Hello, you have reached [name], [title] with Lifeworks Services. I’m not able to take your call at this time. Please leave a message with your name and number and I will get back with you within two business days. Or, you can email me at {lifeworks Email}.”

You might want to include information like this – “If you need any of our fiscal forms, please visit our website at Lifeworks.org. Look under the All-Resources tab.”

Or if you are on vacation include the date that you will return, and if you have someone covering for you, provide their contact information.

- Email Out of Office Script

“Thank you for your email. I am currently out of the office with no access to e-mail or voicemail. I will be back in the office on [date] and will return emails and voicemails as soon as possible.

Our main office number is 651-454-2732 if you would like to leave a message for me.”

If you have someone covering for you, provide their contact information. You might want to include information like this - If you are in need of any forms or documents, please visit Lifeworks.org and look under the All Resources tab.

Use this signature template for your Lifeworks email:

Firstname Lastname *(pronoun/pronoun)*

Position Title

XXX-XXX-XXXX



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[Our Services](#) | [Disability Inclusion Training and Consulting](#)

Social Media (Refer to the Employee Handbook for full details on our Social Media policy)

These are the official guidelines for social media at Lifeworks Services Inc. If you're a Lifeworks employee or contractor creating or contributing to blogs, Facebook, YouTube, or any

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other kind of social media both on and off Lifeworks.org - these guidelines are for you. We expect all who participate in social media on behalf of Lifeworks to be trained, to understand and to follow these guidelines. Failure to do so could put your future participation at risk. These guidelines will continually evolve as new technologies and social networking tools emerge - so check back once in a while to make sure you're up to date.

Communicating on Social Media.

If you choose to connect with a client, remember that they will have access to your personal profile and will associate you with Lifeworks when viewing your personal online profiles.

Lifeworks engages with many social media channels and all Lifeworks channels can be accessed through the organization homepage, lifeworks.org.

If you participate in social media, the following standards must be adhered to. Always refer to and follow the Lifeworks Social Media Guidelines found in the Employee Handbook.

1. If engaging during work hours, be sure to have your supervisor's permission.
2. Never engage on or through your personal channels while working with clients.
3. If engaging with Lifeworks social media channels via your personal social media accounts and especially if you list Lifeworks as your employer on those channels, your personal profile photo must follow the professionalism standards in the employee handbook.
4. When engaging or posting on behalf of Lifeworks and/or in reference to Lifeworks:
 - Stick to your area of expertise and provide unique, individual perspectives on what's going on at Lifeworks and in the world. Post meaningful, respectful comments – in other words, no spam and no remarks that are off-topic, offensive, unprofessional, or inappropriate. Always pause and think before posting. That said, reply to comments in a timely manner, when a response is appropriate.
 - Respect proprietary information and content, and confidentiality.
 - When disagreeing with others' opinions, keep it appropriate and polite.
 - Be respectful of Lifeworks customers and don't mention them by name.

Great customer service is something we can all contribute to! What else can you do to create great outcomes for customers, peers, and Lifeworks? Use your unique talents and abilities to make each interaction a memorable one and an experience that someone will want to return to over and over again.

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