

New Customer Meeting and Site Tour Discussion Guide for EFI

Congratulations!

You have a new prospective customer who is interested in joining your site as a supported employee. Prior to signing up as a customer with Endeavour Foundation, most families and individuals choose to drop in and see our services for themselves, as well as meet our staff and other customers.

The following guide is designed to offer you some things to consider when preparing for a prospective customer to visit your site and to assist you with responding to some frequently asked questions.

We'd love your feedback! If you would like to submit suggestions for improvements to this guide, or you have been asked a particularly curly question, please let us know at marketbrief@endeavour.com.au.

A customer's decision making process

The decision to commence supported employment could be instigated by the prospective customer themselves, a family member or a key influencer like a teacher or NDIS support coordinator. There are lots of factors that are taken into consideration by the customer and family member when assessing whether our EFI may be a good fit for the customer. These may include:

- The first impression made by our support workers, including friendliness, caring demeanour and demonstration of skills in working to support customers;
- The look and feel of the site including break out areas and outdoor spaces;
- Site accessibility, drop-off zones and parking;
- Transport options to the service;
- Other customers at the site and the number of customers;
- Program of social activities;
- Opportunities for social interaction and development; and
- Quality assurance and safety procedures in place to protect the customer.

In addition they will also be supported by their LAC, Support Coordinator or Endeavour Foundation's NDIS team to understand how our services will fit with their NDIS goals and available funding.

Preparing your site

There's an anecdote about a new staff member who went for an interview at a bank branch. While he was waiting for his interview he noticed that all the employees were walking around or stepping over an orange electrical cord that was on the floor of the reception area. No one moved the cord or questioned why it was there, it had become habit for the staff at the bank branch.

A prospective customer and their family who are visiting your site will view the environment with fresh eyes and notice all of the details, including the orange electrical cord! They're using this information to determine whether it's the right choice and it's important to remember this as you prepare your site for a prospective customer visit. Details matter when a prospective customer is assessing Endeavour Foundation for the first time and making a big decision about whether they, or their loved one, will spend a lot of time at that service.

Suggestions for preparing your site environment for a visit:

- Remove unused or damaged furniture and other items from outdoor areas.
- Ensure common areas like the kitchen and canteen areas are clean and tidy.
- Assess the walls for damaged posters and artwork, bluetac residue and old Endeavour Foundation signs/posters. If in doubt, take it down.
- Remove general clutter and equipment from tables and surfaces.

Preparing your customers for a new visitor:

- During toolbox talks, let your customers know that you'll have a new visitor at the site today.
- Ask customers to make the new visitor feel welcome by introducing themselves.

Preparing your staff for a new visitor:

- Let your staff know that you'll have a new prospective customer onsite and their name.
- Ask staff to introduce themselves to the prospective customer and take a minute or two to chat with them and their families.

Ask Production Team Leaders to take a minute to explain the line and the role to the prospective customer and their family.

The Site Tour

Meet the prospective customers at the reception area at the organised time for the meeting. Take the customer and prospect to a quiet area to explain the worksite and expectations around safety and Endeavour's focus on maintaining the safety to ensure the prevention of injury for our supported employees and staff. A good question to ask at this stage could be "How do you feel about wearing specific safety clothing while you're onsite?" which will help you get an indication about the prospective customer's level of comfort.

Some of the key components to focus on when conducting the site tour include:

- Work lines = variety of job roles available across a range of tasks and skill levels. Discuss opportunities to learn to use certain machinery and grow capabilities.
- Canteen/lunch room = showcase the areas indoor and out that are utilized for breaks. Breaks are an opportunity for rest, but they're also a chance to build friendships and socialise with co-workers.
- PPE Equipment including hair nets, gloves and aprons = explain that these are part of the uniform the prospect is expected to wear during their shift.
- Photo boards and visual displays from customer activities = use these photos as examples of the extra-curricular activities that are available for supported employees.

Once you have walked through the space with the family, find a quiet area to sit with the family and perhaps offer them a tea/coffee/water. Use this time to have a relaxed conversation with the customer and family to get to know them a little better. You could also explain the salary structure and earnings in conjunction with the Disability Support Pension.

Good questions to ask

A number of members of Service Delivery have contributed to the production of this resource and below is a list of their recommended questions to ask during a prospect's first visit to our sites.

You have already received a brief about the potential customer from the Customer Service team, so make sure you have read that thoroughly so the family does not have to repeat all of the information they have already shared in their initial contact with Endeavour Foundation.

Talk directly to the individual with disability and allow them time to respond. From our first interaction with the potential customer, we need to demonstrate our customer centric focus to service delivery.

1. "Why do you want a job?" Asking this question up front will help you determine the prospect's areas of interest and you can tailor the tour to these interests. Earning an income can often be a motivator for supported employees and you can use this question to introduce the concept of the salary package and starting wage alongside a customer's DSP.
2. "Do you like to be in a group of people or do you prefer a smaller/quieter environment?" This is a key question to help gauge an individual's level of comfort to be in a group environment and any sensitivities to noise and other stimuli. This could be an opportunity to showcase smaller break-out areas, smaller work lines and outdoor spaces.
3. "Do you have any particular preferences or dislikes that you'd like to tell me about?" This a friendly way to learn more about the customer and to discuss how we can best accommodate them as an individual within our services. You may also uncover some behaviour or preference concerns that perhaps will require additional support or a customer referral to another service provider. A good follow on question to this one is "is there anything in particular we can do to offer you support while you're in our service?"
4. "Do you have any worries about starting work?" Change can be a scary thing for us all. This question can help you uncover and allay the fears of the customer and family.
5. "If you are interested in coming into our service, is there anything we could do to make the transition easier?" Again this type of question will enable you to get to know the individual and their behaviors. If a customer has indicated that they're interested and they are a good fit for your service, you can offer a trial 2 hour shift where they can come in and try to
6. "Are you looking at any other employment providers?" This question will help you understand where the prospect stands in the research and decision making process.
7. "Can you see yourself working here?" Follow up questions to this one could be "What do you think you'll like/dislike about it?" This is a great way to gather feedback and understand how the customer is feeling.

Frequently asked questions

Logistical questions

Q: “How does transport work? What are the options?”

A: Each Endeavour Foundation site has different transport options in place and we’re continually working on improving our transport options for our customers but it can be a big investment. You most likely have some transport funding in your NDIS plan, if you like I’ll ask one of our NDIS specialists within Endeavour Foundation to give you a call to discuss this with you in more detail.

Q: “How often can he/she come?”

A: We operate 5 days per week. There is no minimum or maximum number of days each week that you can come to work. We ask that you choose the same days each week to assist with rostering purposes.

Service questions

Q: “What does Endeavour Foundation offer?”

A: Endeavour Foundation supports people with intellectual disability to live, learn, work and flourish according to their own interests and priorities.

Whatever the goals – for life, work or personally – we collaborate with customers and their family to develop effective, personalised support that fits their needs and interests.

Our services include:

Home

For individuals thinking about moving into your own place for the first time, we can help. We can also provide in-home assistance ranging from support 24 hours a day, to assistance with personal care, household tasks and mealtimes. Our team will help you explore your options and get you to where you want to be.

Daily Living

Making the most of daily life is important to us all. We can help our customers develop important daily skills to live independently, get out and about in their local community, or provide help around the house with daily tasks.

Work

We have a range of employment and training options designed to help our customers reach their goals and find a job they love. With real jobs in a social and supportive environment, we can help you figure out what you want to do and the skills you’ll need to get there.

Learning

Whatever the goals of the individual – for life, for work and personally – we collaborate with our customers to identify the skills and knowledge needed to achieve them.

Working with our customers and their strengths and interests, we'll co-design a learning program that gets them to where they want to be.

Social and Community Participation

Being connected to the community and social networks contributes to a sense of wellbeing, purpose and quality of life.

If our customers want to try a new activity, make new friends or just to get out and about, we have many options available.

Next Steps

If a customer has indicated that they're interested, you can offer a free trial day where they can come in for a morning or the whole day to try out the environment and programs. Ask the family what day of the week would best suit them and try to lock in a date.

Follow Up & Feedback

Following a site tour, you can expect a call from the NDIS Account Manager to discuss how the meeting went. It's important you share the outcome of the site tour with the NDIS Account Manager that referred the customer to you, as they will be following up with the family to ask for feedback about the visit and offer a trial if it is deemed that the customer is a good fit (on both sides), the best steps to on-board the customer effectively.