



The Art Institute of Chicago is implementing a new customer service program designed to teach security officers how to engage visitors and protect its masterpieces.

Artful Engagement

PULLING OFF MICHIGAN AVENUE, walking up the stairs between the two roaring bronze lions, and entering the marble interior of The Art Institute of Chicago can be an intimidating experience. This multibuilding museum is home to *American Gothic*, *Nighthawks*, *A Sunday on La Grand Jatte*, the Thorn Miniatures, and thousands of other priceless masterpieces that attract 1.5 million visitors annually. And despite Ferris Bueller's apparent ease navigating the institute during his infamous day off, the museum can overwhelm first-time visitors.

Yet in 2014, the institute was ranked the number one museum in the world by Trip Advisor. That puts it above household names such as the Louvre, the Uffizi, the Prado, the Guggenheim, and the Met. This ranking is due, in part, to the institute's top-notch customer service, which is embraced by the security department, says Thomas Henkey, director of operations for the safety and security department. "Our department's really taken the lead because we interact with the patrons so much in the galleries," Henkey says.

"We are the face of the museum. And we take that very, very seriously."

Other than purchasing a ticket from museum personnel at the front desk, interactions with security officers are often the only contact visitors have with the institute's staff while visiting. "Their impression of our facility and of this fantastic place is going to come through those officers," Henkey explains. "So it's important that they know what they're doing."

Over the past year, the institute has put together an extensive in-house training program that teaches frontline staff and security officers how to interact with customers so they have a positive experience at the institute the moment they step into the lobby.

BASELINE

The security team is made up of 50 in-house officers and supervisors who work directly for the institute. Approximately 175 additional officers are contracted through Securitas and make up the institute's daytime gallery staff and special events security.

“We spend a lot of time out there being visible in the galleries, interacting with other departments, advocating for the safety of the art, the safety of the visitors, and the safety of the staff—those are our real priorities,” Henkey explains.

Along with patrolling the galleries and keeping an eye on the art, security officers tend to receive a variety of questions. Where’s the nearest restroom? What time does the café open? Where’s that painting with the people with the pitchfork?

Security officers could answer these questions, but they hadn’t necessarily received training on how to give directions to patrons in a way they could be most easily understood. Additionally, there could be confusion about how to engage a visitor who wasn’t adhering to a museum policy, without making them feel threatened or intimidated. For example, officers didn’t know how to approach a visitor wearing a backpack and ask him to either check it at the front desk or wear it on his front so it doesn’t strike the artwork, without causing offense or confusion about why this is a museum policy.

In 2014, the institute decided to remedy this issue by developing a customer service program. It sought inspiration through the models developed by other organizations. However, it didn’t find a method that reached the level the institute wanted.

Instead, it hired Chase Rogers to be its new manager of employee training and development. As Rogers puts it, he was hired to create a uniform “customer service, visitor engagement program, and training for all of our frontline staff.”

Rogers worked with senior leadership, held employee focus groups, and surveyed visitors to identify ways that each staff position—from the ticket desk to

The iconic bronze lions greet visitors who enter the museum from Michigan Avenue.



the café—could contribute to customer engagement and service.

“My big thing was to create a program...where if you have a badge, if you’re an employee at the art institute or represent the art institute, you know how to engage with our visitors,” Rogers says. “You know how to direct them to the correct places. You know how to really create that warm environment with them.”

Rogers used these findings to create a multiple phase training process that teaches customer engagement built around the institute’s core service values: engage, listen, and execute.

PHASES

Training focuses on specific skills, such as navigating the facility. The most common questions visitors ask are where things are located within the multibuilding institute. For instance, people generally want to know where the nearest restroom is, so staff members are trained to know where the closest facility is and how to explain how to get there.

Staff are also trained to answer questions from patrons who don’t always accurately describe what they are looking for, such as when people ask to see the painting of the unhappy looking people. Employees are taught how to determine

that the patron is asking to see *American Gothic* without making that person feel stupid for not knowing the proper name of the painting they are looking for.

“We have a lot of visitors and patrons who are new to the museum, and the last thing we want to do is make them feel like they don’t know what art is, or what the museum’s about,” Rogers explains. “So we want to make it a welcoming and warm environment for them...so our security officers are learning how to answer those questions.”

This also ties into training staff to identify visitors who look confused and to help them, something that’s especially important with international visitors who may not be fluent in English. To engage with these individuals, staff are taught how to explain how to get somewhere using very basic terminology and body language.

For people from a foreign country, “it can be hard to have that verbal communication, so another part of that is nonverbal communication, and [staff] are getting trained on the nonverbal communication styles and what to look for,” Rogers adds.

Each of these aspects of training is divided into three phases, such as Communicating with Difficult Visitors;



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Inclusive Practices, which focuses on diversity and interacting with patrons with special needs; and Coaching for Success, which trains management and frontline leaders to motivate their departments.

All of the phases are completed by employees annually and are taught in-house using lectures, group work with activities and scenario training, and videos. “We know that every single person has a different way of learning,”

heavily on hands-on learning where staff participate in role play specific to their environment.

For instance, a common issue for security officers is how to interact with a patron who wants to enter an area that’s reserved for members only. Through the training, security officers can walk through the scenario together and discuss different methods they’ve used to interact with a patron and how effective that engagement was.

problems—like handling the situation with a man wearing a backpack on his back. When it is explained to him that wearing his bag on his back could accidentally damage the artwork by brushing up against something, the visitor is likely to be much more receptive to complying with the museum policy, Roger adds. “When you can explain why we have this policy...it just makes it so much easier” to get individuals to comply with it without escalating the situation, he explains.

Along with lectures and group work, the institute is also looking to add e-learning as an alternative teaching method. As of press time the system had not been implemented, but Rogers says he’s hoping that e-learning can be used as an introduction and training refresher.

These e-learning tutorials would be geared towards new security officers and staff to give them a feel for the institute’s culture with a preview of things they’ll learn over the following few months about their job and the institute.

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Rogers says. “Some just like lectures, some need to have physical interaction, some like visual. So our training has multiple pieces to it.”

However, Rogers says lectures aren’t always effective. For example, “someone is likely to not take the right info back” out into the workforce after listening to a lecture. This is why the institute relies

Not only does this help train officers on how to engage visitors, but Rogers says it also builds team morale and gives officers a chance to learn from each other—something that doesn’t often happen when they’re spread out around the institute during their shifts.

Out of these discussions, officers can learn new tactics or discuss common

E-learning can also be valuable as refresher training because it would allow officers to watch videos at their desks or a localized computer in the institute on new training scenarios and as a knowledge check to test themselves on previous training.

The institute is currently using e-learning to train volunteers at the institute, and Rogers says he hopes to implement it for staff use later in the year.

TRAINING

Along with the phased training all staff members receive, departments have more-focused customer service training—called hip-pocket or refresher training—that’s targeted to their specific job function.

For security officers, this portion targets interacting with visitors. “If your one interaction is with that security officer for a couple of minutes on just how to

get somewhere, we look at it as it could either elevate their experience...or decrease it,” Rogers says.

Because of this, the institute expects its security officers to greet visitors in various ways when they enter the institute. Officers stationed near the entrance to the institute are instructed to say “hello” and “welcome to the institute” when people step inside.

Those stationed elsewhere are encouraged to nod or smile at visitors so passersby feel acknowledged, without “being over the top or annoying,” Rogers explains. “We don’t want our officers to just stand there and stand guard—that’s why we call them officers and not guards; we have a higher expectation for them.”

Officers are also trained on developing listening skills, which are especially important when dealing with difficult visitors and customers. “Usually when things escalate, it’s because someone

isn’t listening well,” Rogers adds.

Officers are taught to listen to patrons and to answer their questions, if they can. If a visitor raises a question or concern that an officer can’t answer or help with, Rogers says the officer is encouraged to call his supervisor or manager to handle the situation.

And the security department is on board, embracing the training as a necessary skill for its officers alongside operational security training. “We are very adamant that our security officers be able to do both,” Henkey says. “Sometimes those two may sound contradictory, but if we implement them correctly we can become the best program in the country.”

The security department has adopted the customer service training into a two-track approach, so officers are prepared to handle security threats while also being personable.

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“We want to be extremely friendly, but extremely aware of our surroundings and able to escalate [our activities] very quickly—not only to additional security resources, but also to law enforcement if necessary,” Henkey adds.

This approach is also beneficial for the

for improvement. For instance, one of the biggest challenges the evaluations have identified for the security department—and the institute as a whole—is the need for better listening skills. This feedback is being taken into account for developing training modules down the

coaching tools for them. The institute “wants our coaches to be able to help their employees” and wants to “give them the tools and the tactics to help them be able to coach—to know what to expect,” Rogers says.

Ideally, it would like to do this by training managers to use positive reinforcement with their employees so they can identify what they’re doing well and what still needs improvement. “We just really want to empower our managers,” Rogers adds. “We expect our security officers to be empowered, and we want them to feel empowered that their managers have their back.”

Additionally, throughout this process, Rogers says the institute found that officers should know more about the collection. It plans to create more training and presentations about the art itself to inform officers why the pieces are so important.

The institute’s Rhine Education Center, which houses a group of docents and curators that handle school tours and exhibits, will play a major role in this process. Security officers are already being encouraged to listen in on the tours conducted daily in the galleries while they’re on duty. The center will also assist in putting together a presentation about the collection that will become part of the orientation process for all new security officers.

“So [officers] will be able to know this is why this painting is so important; not only where the painting is, but this is why it is so key,” Rogers explains. He’s also optimistic that this process will help officers learn about pieces in the collection that they might personally like, so they can better answer patrons’ questions when they ask: What should I see?

The security officers are “employees here, and so we want them to be able to say what’s inspiring to them,” he adds. “Because if they can talk about that and they’re engaged with it, how much more are they going to be able to engage with others?” ■

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institute because it helps deter individuals who might be tempted to damage the collection. The more officers engage with patrons, the lower the opportunity for misdeeds. “You’ll find that most people who are going to do harm to something, especially at our institute, they don’t want to be seen; they don’t want to be noticed,” Rogers explains.

All of this has led to a change in the way the institute thinks about hiring security officers—from looking for individuals with a military or security background to those who have a customer service mindset. This is “because we see that we can train the security part, but that customer service part is so key that it’s innate in a person,” Rogers says.

IMPLEMENTATION

Key to implementing the customer service training is its continuous cycle. After staff members complete the training, they will be coached on it. “You’re going to have conversations weekly or monthly on pieces of the training and then we will keep evaluating,” Rogers adds.

So far, the institute has conducted evaluations in the form of employee surveys—or action-planning reports—after completing each phase of training. The action-planning reports comprise evaluations by staff members, answering questions such as: What is the best thing you learned? What are some challenges or opportunities with implementing this training?

These questions cause staff to think about the training and allow their managers—called coaches—to take that information and use it as a starting point

road to give staff the tools to develop these skills, Rogers says.

“We want our security officers to feel empowered, to be able to feel like they know what they’re talking about and to really know and feel confident that if somebody comes to them with a question...they know how to handle that,” he explains.

And since the training was rolled out in February, managers are already seeing results. In his evaluation, one officer reported that he had worked at other cultural institutions for more than eight years and never had this level of customer service training before. Others told Rogers that they “feel more empowered” as they “understand how they should be interacting with our guests,” he adds.

FUTURE GOALS

Moving forward, Rogers says the institute plans to offer even more detailed training on specific scenarios that staff might encounter.

Rogers is working with the security team to identify more of the common issues they deal with on a regular basis. One already-identified issue is being more inclusive when engaging with individuals who are different, from non-native English speakers to individuals with disabilities. “We do really well with people that understand the museum,” Rogers says, but more can continue to be done for those who are not familiar with the institute and are different from the common group of visitors.

The institute is also looking at how it can create specific scenarios for its managers to coach to and develop more