



Memorandum

TO: SMART CITIES AND SERVICE
IMPROVEMENTS COMMITTEE

FROM: Dolan Beckel

SUBJECT: CITY INITIATIVES ROADMAP:
CUSTOMER SERVICE VISION AND
STANDARDS STATUS REPORT

DATE: October 24, 2022

Approved

Date

10/26/2022

RECOMMENDATION

Accept the status report on the Customer Service Vision and Standards initiative aimed at refreshing City values and standards, increasing public and internal satisfaction with services as part of the approved City Initiatives Roadmap for 2022-2023.

OUTCOME

Committee will understand and provide feedback on the initiative scope, approach, status, and next steps in the project.

BACKGROUND

As one of the City Manager Key Focus Areas, and as an initiative on the 2022-2023 City Initiatives Roadmap adopted by the City Council on May 16, 2022¹, the Customer Service Vision and Standards initiative focuses on transforming the way that the City supports residents, businesses, and visitors in the delivery of City Services. The initiative also aligns with the City Manager's *One Team Leadership Values and Expectations* for "Quality and Excellent Customer Service."

On April 19, 2022², the City Council adopted a resolution authorizing the City Manager to negotiate and execute master consulting agreements with qualified vendors. Given the City's current staffing challenges and need for specific expertise, it was determined that external

¹ 2022-2023 Budget Study Sessions Agenda, "2022-2023 Proposed City Roadmap", page 5:

<https://sanjose.legistar.com/View.ashx?M=A&ID=964944&GUID=E2B80BF3-30A5-42FF-A965-AB6EEB2758AE>.

² Council Meeting of 4/19/2022, Item 2.8:

<https://sanjose.legistar.com/View.ashx?M=F&ID=10703948&GUID=9FE2FFD0-86D6-4598-AD40-A1C891859A24>.

consultants were the best resourcing channel to provide additional project-based capacity and current cross-industry knowledge related to customer service best practices. Guidehouse was the highest scoring bidder and was selected as the vendor to provide services for four initial Tasks:

- Task 1. **Discovery.*** Use targeted interviews and data analysis to develop a better understanding of the customer experience across various City departments and offices, person-to-person customer service needs, and areas of focus for transforming the way that the City provides customer service. **This task is nearing completion.**
- Task 2. **Mapping the Current State and Analysis.*** Prioritize and segment customers and identify personas representing key attributes, behaviors, and scenarios that differentiate their journey using City services. Use primary and secondary research to create journey maps that capture persona love points, pain points, and insights at key moments within City service delivery. This includes “active” delivery of services and “passive” general inquiries including emails and phone calls. Customer personas should include but not be limited to non-English speaking customer and differently abled customer use cases for key stakeholders identified during Discovery. **This task is in process.**
- Task 3. **Formulate a Customer Service Vision and Standards.*** Conduct strategic visioning and reporting sessions with City staff based on previous insights and consultant’s external cross-industry customer service expertise. Develop a Customer Service Vision (future state) to capture and describe the ideal future of customer service within the delivery of City services. Develop a set of Standards to give a foundation for and guide future implementation. Elements of the set of Standards should include, but not be limited to, response time, empathy and resolution, creative problem-solving, and compassion and sensitivity. **This task has started.**
- Task 4. **Identify Improvement Opportunities and Create a Transformation Plan.*** Conduct a current state gap analysis and create future state customer service journey maps that align with Customer Vision and Standards. Identify recommendations for impactful opportunities including, but not limited to, people, process, and technology improvements and training opportunities to pursue over several years to transform how the City provides customer service. Also identify recommendations and improvement opportunities based on previous Tasks including interviews, processes, policies, governance, and supportive technology to meet specific outcomes such as reduced cost, reduced time, improved quality, improved accessibility, and improved equity in City service delivery. Develop and apply a performance management framework to understand the desired outcomes and the degree to which improvement opportunities are impacting customer service within the delivery of City services based on an Agile prioritization methodology. Create a multi-year transformation plan for implementing short-term, high-priority quick wins, short-term pilots, and long-term, at-scale recommendations. Upon approval of the transformation plan, work with City staff to refine high-level budget requests as part of the annual priority setting and budget process. **This task has not started.**

ANALYSIS

The following summarizes the results of work completed thus far and next steps including:

1. Discovery Process;
2. Quick Wins Initiated; and
3. Next Steps.

Discovery Process

As part of Task 1, from June through October 2022, the City engaged with 416 unique internal and external stakeholders over six engagement methods:

1. *City Council and City Staff Interviews*, in which the team engaged City leaders and Staff in conversations on challenges and opportunities related to customer service delivery and access. The team spoke with 28 members of City leadership in priority service areas, the Mayor, six Councilmembers, and six of their Council Office Staff.
2. *Mystery Shopping*, in which the team examined seven scenarios by conducting journey research from the perspective of the customer to inform an understanding of key customer pathways. This included analyzing scenarios in English, Spanish, and Vietnamese. The following seven mystery shopping scenarios were assessed through SJ311, phone, email, and web channels:
 - a. How do I host a picnic at the park?
 - b. How can I apply for a business parking permit?
 - c. How do I apply for affordable housing?
 - d. How do I report graffiti?
 - e. How do I report an abandoned vehicle?
 - f. How do I schedule free junk pickup?
 - g. How do I get a license for a new pet?
3. *Call and Front Desk Observations*, in which the team listened to 65 live calls and SJ311 call recordings to understand customer service standard procedures and key customer issues. The team also conducted 30 observations at front desk service points to understand customer journeys. Observation locations included City Hall (Permits, Planning, Building, and Code Enforcement, Department of Transportation, Parks, Recreation, and Neighborhood Services Department, and Environmental Services Department), Animal Care and Services intake, and Police Dispatch, among others.
4. *Phone and Virtual Outreach*, in which the team spoke with 37 customers representing personas from City stakeholder referrals. The team provided initiative introductions and interview requests at two Neighborhood Association meetings (Alviso and Naglee Park), and continued outreach to key customers from a representative list of over 200 customer referrals from City stakeholders.

5. *Intercept Interviews*, in which the team conducted brief, in-person intercept interviews at 24 locations across the City, including City Hall (e.g., Business Tax, lobby and information desk, among others), Community Centers, Library branches (including Martin Luther King Jr. Library), San José State University, and other community locations (e.g., El Chaparral Supermarket). The team utilized interpreter services to conduct intercept interviews in-language with Vietnamese- and Spanish-speaking residents.
6. *Staff Affinity Groups*, in which the team engaged 34 Staff from across departments to review, react to, and provide a service delivery perspective on customer service across six representative personas and 13 unique customer journeys shown in Table 1. These representative personas were developed across attributes including: customer type, age, income, language preference, channel preference, housing status, accessibility, household/business size, and other proxy attributes.

Table 1. Customer Journey by Representative Customer Personas

No.	Customer Persona	Customer Journey
1	Young college student	<ul style="list-style-type: none"> • How to report non-emergency property damage • How to adopt a pet
2	Family seeking assistance	<ul style="list-style-type: none"> • How to apply for affordable housing • How to enroll in a childcare program
3	Young person, City employee, calling on behalf of a relative	<ul style="list-style-type: none"> • How to report an animal issue • How to get a new recycling bin • How to get a utility discount
4	Elderly resident and community leader	<ul style="list-style-type: none"> • How to report an abandoned vehicle • How to abate overgrown vegetation
5	Employee at a property development business	<ul style="list-style-type: none"> • How to get a status update on a building permit • How to report an encampment concern
6	Couple opening a small business	<ul style="list-style-type: none"> • How to get a business tax license • How to obtain a business operation permit

The data and insights collected during the discovery process are currently being synthesized into people, process, and technology grouped opportunities that will inform the Vision, Standards, and Transformation Plan.

Interim Quick Wins Initiated

During discovery activities, several quick win opportunities emerged for people, process, and technology solutions that could be implemented within current priorities, budget, and staff capacity. Staff took immediate steps to address issues identified in the discovery phase where they were opportune. Table 2 highlights several interim quick win summaries by service area and customer issue resolved.

Table 2. Customer Service Vision and Standards Interim Quick Wins

Service	Customer Service Issue	Quick Win Summary	Status
SJ311	Language Access: Spanish speakers using the 311 chat were receiving responses in English.	Limiting Spanish live chat to only be available when there is a Spanish speaking representative and encouraging SJ311 staff to utilize Google translate.	In Progress
SJ311	Language Access: The hold message of the SJ311 phone tree was not translated to Spanish.	Spanish SJ311 hold message was added to the phone tree.	Complete
SJ311	Information Uniformity: Information was inconsistent across DOT webpages. Non-English language representation was also not uniform.	When customers went to the FAQ section of the DOT webpage and information was inconsistent with other pages. The SJ311 and Communications teams worked to update all relevant information.	Complete
SJ311	Transfers: Customer did not know when they were being transferred outside of the SJ311 phone line, creating customer confusion about who they were speaking to.	SJ311 department implemented an automated message to alert callers when they are being transferred from the SJ311 line to an external department (e.g., DOT).	Complete
Animal Care and Services / SJ311	Staffing: Customer called ACS and was rerouted to SJ311 where they were told everyone was in a meeting and could not answer the call.	Reduced SJ311 team meeting length from 60 minutes to 30 minutes to decrease windows of times when reps are unavailable during workday. SJ311 updated training for overflow partners so that there is always a representative available for escalations.	Complete
Animal Care and Services	Phone Tree: The ACS phone line was routing all non-emergency customer inquiries to the same voicemail.	Staff are working to update call flow (e.g., reviewing for any “dead end” pathways like the “Customer Representative” option).	In Progress

Communications	Language Access: While start up pages were translated – attachments, forms, and pages many clicks within the website were not.	Website translations with SJ311 products are being analyzed and any gaps will be identified with the appropriate team.	In Progress
Communications	City Tools: Some employees are unaware of city-wide access to translation services.	Communications Office sent out a city-wide email to City staff to educate them on these services.	Complete
City Manager's Office	Partner Access and Awareness: A key City partner was feeling disconnected from a variety of City services for which they were in need, yet unaware.	The City Manager's Office connected the partner to a variety of City resources and relationships, including COVID-19 Recovery, and Office of Economic Development and Cultural Affairs, and Community Energy services.	Complete

Next Steps

City Staff and Guidehouse are currently analyzing the Discovery and Current State Mapping data. The results of this analysis will inform the content of the Vision, Standards, Improvement Opportunities, and Transformation Plan.

City Staff will continue to implement interim quick wins that can be done within current priorities, budget, and staff capacity.

The Administration will bring forward solutions-oriented recommendations along with the Discovery findings as part of the 2023-2024 Annual Priority Setting and Budget Process.

CONCLUSION

This project is on track to recommend performance improvement opportunities across people, process, and technology as part of a multi-year transformation that will enable staff to deliver excellent customer service.

EVALUATION AND FOLLOW-UP

The administration will bring forward solutions-oriented recommendations along with the Discovery findings as part of the 2023-2024 Annual City Budget Process and Council Priority-Setting Process. This will include a framework to evaluate the performance of our customer service capability.

CLIMATE SMART SAN JOSE

The recommendation in this memo has no effect on Climate Smart San José energy, water, or mobility goals.

PUBLIC OUTREACH

This memorandum will be posted on the City's website for the November 3, 2022, Smart Cities and Service Improvement Committee meeting.

Community engagement and public outreach was conducted as part of Task 1, including engaging with 416 unique stakeholders through in-language phone, virtual, and in-person customer interviews, partner and community-based organization interviews, and in-person customer observations conducted at point of City service.

COORDINATION

This memorandum and related documents were prepared in coordination with the City Attorney's Office, the City Manager's Budget Office, the City Manager's Office of Administration, Policy, and Intergovernmental Relations, and the Information Technology Department.

COMMISSION RECOMMENDATION/INPUT

No commission recommendation or input is associated with this action.

FISCAL/POLICY ALIGNMENT

This action aligns with the City Manager Key Focus Area of *Customer Service Vision and Standards*.

This action aligns with the 2022-2023 City Initiative Roadmap and the *Customer Service Vision and Standards* initiative, which seeks to improve the customer service experience for supporting residents, businesses, and visitors in accessing City Services.

This action aligns with the Enterprise Priority "Powered by People" which states that: "We recognize that our over 6,900 employees power the City of San José and our success as a City is dependent on our ability to create a dynamic and engaged workforce. Our employees' ability to provide excellent service is strengthened when we invest in attracting talent, providing

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opportunities for career growth, enabling an environment focused on health, safety, and wellness, and retaining a diverse workforce in a workplace that is equitable and inclusive.”

CEQA

Not a Project, File No. PP17-009, Staff Reports, Assessments, Annual Reports, and Informational Memos that involve no approvals of any City action.

/s/

DOLAN BECKEL

CITY MANAGER'S CHIEF OF STAFF

City Manager's Office

For questions, please contact Erik Chiarella Jensen, Assistant to the City Manager, at erik.jensen@sanjoseca.gov, or Kia O'Hara, Program Manager, SJ311 Customer Contact Center, at kia.ohara@sanjoseca.gov.