

(d)2. CITY INITIATIVES ROADMAP: CUSTOMER SERVICE VISION AND STANDARDS

Smart Cities and Service Improvements Committee
November 3, 2022



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2022-2023 City Initiatives Roadmap

Enterprise Priority	Initiative										
COVID-19 Pandemic Community and Economic Recovery	Housing Stabilization	Re-Employment + Workforce Development	Small Business Recovery + Resilience	COVID-19 Recovery Task Force							
Sustainable and Resilient City Infrastructure and Emergency Preparedness	Disaster Ready + Climate Smart	Reliable Infrastructure Resilience	Clean Energy Resilience	Water Supply Resilience							Natural Environment Restoration
Ending Homelessness	Emergency Housing System Expansion	Encampment Services, Outreach, Assistance, + Resources	Encampment Management + Safe Relocation	Emergency Housing Financial Sustainability							Safety Net Services County Coordination
Safer San José	Police Reforms	Vision Zero Traffic Safety	City Services Continuity of Operations								
Clean, Vibrant, and Inclusive Neighborhoods and Public Life	Children + Youth Services Master Plan	Education, Digital Equity, + Digital Literacy	BeautifySJ Encampment Trash Services	Vehicle Blight	Child Care Siting Policy Update						
Building the San José of Tomorrow with a Downtown for Everyone	Align Zoning with General Plan	Development Services Process Improvements	Google Downtown West Development	BART Silicon Valley Extension	Airport Connector + Diridon Station					North San José	High-Speed Rail
Enterprise Priority Foundational	Initiative										
Strategic Fiscal Positioning and Resource Deployment	Emergency Fiscal Recovery + Planning	Outcomes, Equity Indicators, + Performance Management	Disparity Study	Advancing Equity through Culture + Practice	Procurement Improvement						
Powered by People	Workforce Diversity + Talent Pipeline	Citywide Hiring	Employee Wellbeing, Growth, + Retention	Digital Workforce	Customer Service Vision + Standards						
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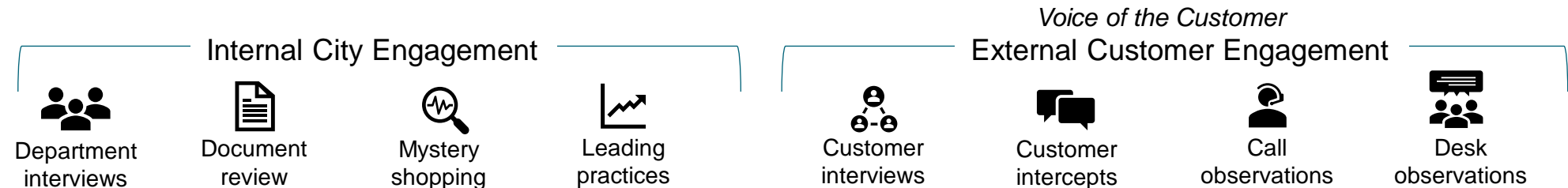
Customer Service Standards Project Overview

The City is engaging Guidehouse over four tasks to address customer service opportunities

PURPOSE

How might the City of San José better support residents, businesses, and visitors in accessing City services through person-to-person customer service and develop a comprehensive Customer Service Vision, set of standards, and actionable recommendations for improvement.

INPUTS

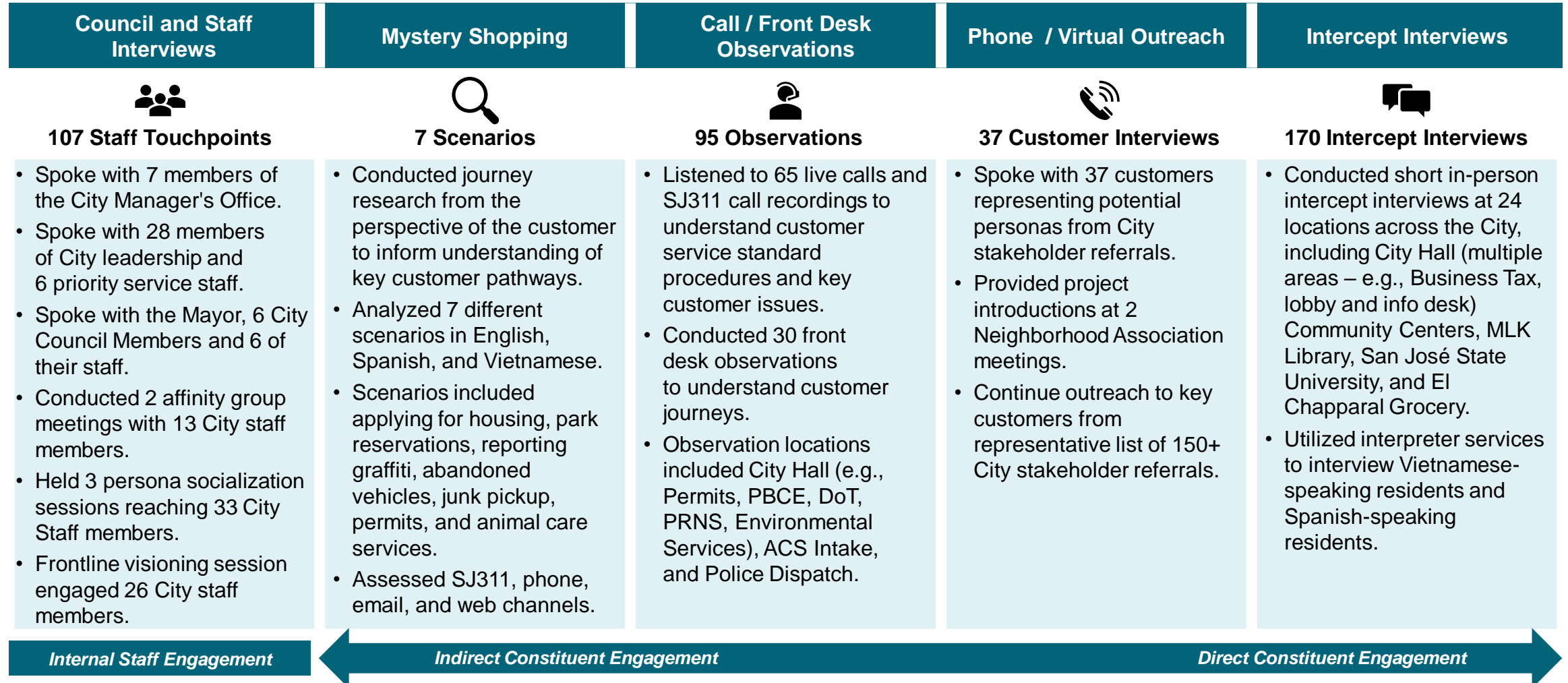


PROJECT TASKS

- **Task 1 – Discovery.** *Current state review, internal City engagement, external customer engagement. Completed.*
- **Task 2 – Mapping the Current State.** *Representative customer personas, data-driven journey maps. In process.*
- **Task 3 – Vision and Standards.** *Collaborative visioning, customer service standards development. In process.*
- **Task 4 – Future State Mapping and Transformation.** *Future state journey maps, gap analysis, recommendations and quick wins, transformation plan and cost estimate, evaluation plan. Not started.*

Discovery Inputs

We engaged 416 internal and external stakeholders over 5 engagement methods



Customer Personas

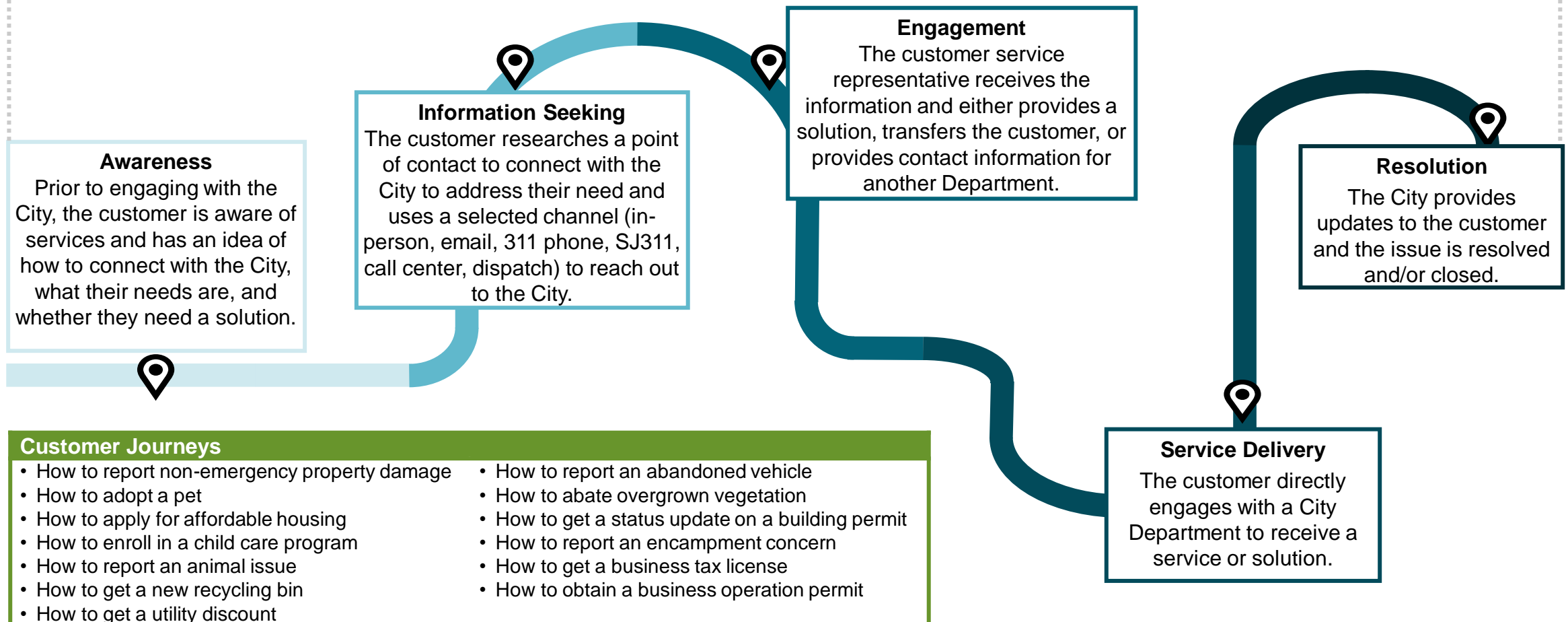
Based on these attributes, we developed six representative customer personas

	Persona Attributes							
Persona	Customer Type	Age	Income	Language	Channel Preference	Housing Status	Accessibility	Other
Persona 1: Young student	Resident	Young	Low	English/Spanish	Online; App	Living at Family Home	N/A	Single, pet owner
Persona 2: Family seeking assistance	Resident	Middle	Low	Spanish	Phone; In-Person	Living at Family Home / Unstable Housing	Mobility Concerns (Husband)	Married with three children
Persona 3: Young person calling on behalf of a relative	Resident City Employee	Young	Middle	English/ Vietnamese	Online; Phone	Renter with Roommates	N/A	Acting as Proxy for relative; City employee
Persona 4: Elderly resident, community leader	Resident	Elderly	High	English	All Channels	Homeowner	Mobility Concerns; Technological Constraints	Single (Widowed); Neighborhood Association Member
Persona 5: Employee at property development business	Business	Middle	Middle	English	Phone; Email	Homeowner	N/A	Married with two children; Acting as Proxy for Business
Persona 6: Couple opening a small business	Business	Middle	Middle	Vietnamese	Phone; In-Person	Living at Family Home	N/A	Married; Small Business

Customer Journey Key Phases




Current work will map customer journey pain points and love points across five key stages

Customer Service. Supporting customers to access and navigate the services they need across five key phases of the customer journey



Interim Quick Wins

Opportunities implemented within current priorities, budget, and staff capacity

Service Area		Customer Issue	Quick Win Summary	Status
 People	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
	Comms	City Tools: Some employees are unaware of city-wide access to translation services.	Communications department is working on sending out a city-wide email to SJ staff to educate them on these services.	In progress
	CMO	Partner Access: A key City partner was feeling disconnected from a variety of City services for which they were in need, yet unaware.	The City connected the partner to resources and relationships such as recovery, workforce, and community energy services.	Completed
 Process	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.	Completed
	SJ311	Information Uniformity: Information was inconsistent across DOT webpages. Non-English language representation was not uniform.	When customers went to the FAQ section of the DOT webpage, information was inconsistent with other pages. The SJ311 and Comms teams updated all relevant information.	Completed
	Animal Care 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 to 30 minutes to decrease times when reps are unavailable. SJ311 updated training for overflow partners so there is always a rep available.	Completed
	Animal Care 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 “dead end” pathways like the “Customer Representative” option). Team met with ACS leadership to discuss implementation.	Initiated
 Tech	Comms	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. More time and discussion will be needed to execute this item as a quick win.	Initiated
	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 has implemented an automated message to alert callers when they are being transferred from the SJ311 line to an external department (e.g., DOT).	Completed

Next Steps

We will continue working towards a Customer Service Vision and Standards

Next Steps

- 1 Develop a citywide Customer Service Vision and Standards
- 2 Map the future state and develop a transformation plan with embedded performance management framework
- 3 Continue to implement interim quick wins
- 4 Bring forward any appropriate recommendations as part of the Budget Process

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Feedback and questions

Please reach out if you have any questions.

For questions:

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