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

Smart Cities and Service Improvements Committee November 3, 2022



## 2022-2023 City Initiatives Roadmap

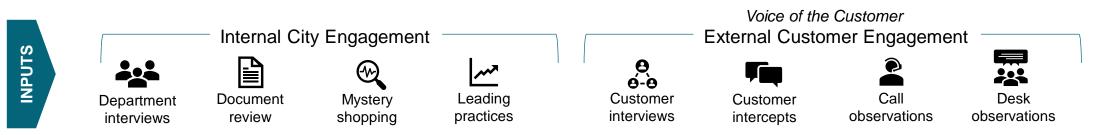
| Enterprise Priority  | Initiative                                  | •  |  |   | -   |                |                 |   |   |
|--|---|--|--|---|---|----------------|-----------------|---|---|
| COVID-19 Pandemic Community<br>and Economic Recovery                           | Housing<br>Stabilization                    | Re-Employment +<br>Workforce<br>Development                        | Small Business<br>Recovery +<br>Resilience       | COVID-19<br>Recovery Task<br>Force                  |   |                |                 |   |   |
| Sustainable and Resilient City<br>Infrastructure and Emergency<br>Preparedness | Disaster Ready +<br>Climate Smart           | Reliable<br>Infrastructure<br>Resilience                           | Clean Energy<br>Resilience                       | Water Supply<br>Resilience                          | Natural<br>Environment<br>Restoration         |                |                 |   |   |
| Ending Homelessness  | Emergency<br>Housing System<br>Expansion    | Encampment<br>Services,<br>Outreach,<br>Assistance, +<br>Resources | Encampment<br>Management +<br>Safe Relocation    | Emergency<br>Housing<br>Financial<br>Sustainability | Safety Net<br>Services County<br>Coordination |                |                 |   |   |
| Safer San José   | Police Reforms                              | Vision Zero<br>Traffic Safety                                      | City Services<br>Continuity of<br>Operations     |   |   |                |                 |   |   |
| Clean, Vibrant, and Inclusive<br>Neighborhoods and Public Life                 | Children + Youth<br>Services Master<br>Plan | Education, Digital<br>Equity, + Digital<br>Literacy                | BeautifySJ<br>Encampment<br>Trash Services       | Vehicle Blight                                      | Child Care Siting<br>Policy Update            |                |                 |   |   |
| Building the San José of<br>Tomorrow with a Downtown for<br>Everyone           | Align Zoning with<br>General Plan           | Development<br>Services Process<br>Improvements                    | Google<br>Downtown West<br>Development           | BART Silicon<br>Valley Extension                    | Airport<br>Connector +<br>Diridon Station     | North San José | High-Speed Rail | Wage Theft<br>Prevention Policy<br>+ Responsible<br>Contractor<br>Ordinance | Affordable<br>Housing on<br>Assembly Use<br>Sites Policy<br>(YIGBY) |
| Enterprise Priority Foundational   | Initiative                                  |  |  |   |   |                |                 |   |   |
| Strategic Fiscal Positioning and Resource Deployment                           | Emergency Fiscal<br>Recovery +<br>Planning  | Outcomes, Equity<br>Indicators, +<br>Performance<br>Management     | Disparity Study                                  | Advancing Equity<br>through Culture +<br>Practice   | Procurement<br>Improvement                    |                |                 |   |   |
| Powered by People  | Workforce<br>Diversity + Talent<br>Pipeline | Citywide Hiring  | Employee<br>Wellbeing,<br>Growth, +<br>Retention | Digital Workforce                                   | Customer Service<br>Vision +<br>Standards     |                |                 |   | 2   |

## **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.



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

| Council and Staff<br>Interviews  | Mystery Shopping   | Call / Front Desk<br>Observations   | Phone / Virtual Outreach  | Intercept Interviews   |
|--|--|---|---|--|
| 107 Staff Touchpoints  | <b>Q</b><br>7 Scenarios  | 95 Observations   | 37 Customer Interviews  | <b>170 Intercept Interviews</b>  |
| <ul> <li>Spoke with 7 members of<br/>the City Manager's Office.</li> <li>Spoke with 28 members<br/>of City leadership and<br/>6 priority service staff.</li> <li>Spoke with the Mayor, 6 City<br/>Council Members and 6 of<br/>their staff.</li> <li>Conducted 2 affinity group<br/>meetings with 13 City staff<br/>members.</li> <li>Held 3 persona socialization<br/>sessions reaching 33 City<br/>Staff members.</li> <li>Frontline visioning session<br/>engaged 26 City staff<br/>members.</li> </ul> | <ul> <li>Conducted journey<br/>research from the<br/>perspective of the customer<br/>to inform understanding of<br/>key customer pathways.</li> <li>Analyzed 7 different<br/>scenarios in English,<br/>Spanish, and Vietnamese.</li> <li>Scenarios included<br/>applying for housing, park<br/>reservations, reporting<br/>graffiti, abandoned<br/>vehicles, junk pickup,<br/>permits, and animal care<br/>services.</li> <li>Assessed SJ311, phone,<br/>email, and web channels.</li> </ul> | <ul> <li>Listened to 65 live calls and<br/>SJ311 call recordings to<br/>understand customer<br/>service standard<br/>procedures and key<br/>customer issues.</li> <li>Conducted 30 front<br/>desk observations<br/>to understand customer<br/>journeys.</li> <li>Observation locations<br/>included City Hall (e.g.,<br/>Permits, PBCE, DoT,<br/>PRNS, Environmental<br/>Services), ACS Intake,<br/>and Police Dispatch.</li> </ul> | <ul> <li>Spoke with 37 customers<br/>representing potential<br/>personas from City<br/>stakeholder referrals.</li> <li>Provided project<br/>introductions at 2<br/>Neighborhood Association<br/>meetings.</li> <li>Continue outreach to key<br/>customers from<br/>representative list of 150+<br/>City stakeholder referrals.</li> </ul> | <ul> <li>Conducted short in-person<br/>intercept interviews at 24<br/>locations across the City,<br/>including City Hall (multiple<br/>areas – e.g., Business Tax,<br/>lobby and info desk)<br/>Community Centers, MLK<br/>Library, San José State<br/>University, and El<br/>Chapparal Grocery.</li> <li>Utilized interpreter services<br/>to interview Vietnamese-<br/>speaking residents and<br/>Spanish-speaking<br/>residents.</li> </ul> |
| Internal Staff Engagement  | Indirect Constituent Er  | ngagement   | Direct  | Constituent Engagement   |

## **Customer Personas**

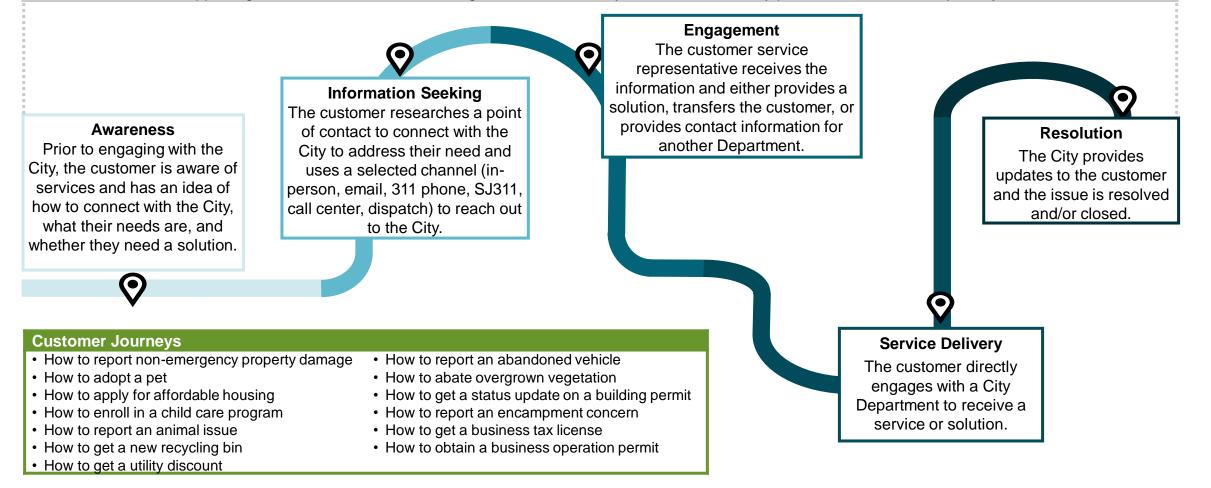
#### Based on these attributes, we developed six representative customer personas

|  | Persona Attributes        |         |        |                        |                       |  |  |   |
|--|---------------------------|---------|--------|------------------------|-----------------------|--|--|---|
| Persona  | Customer Type             | Age     | Income | Language               | Channel<br>Preference | Housing Status                                 | Accessibility                                      | Other   |
| Persona 1:<br>Young student                                      | Resident                  | Young   | Low    | English/Spanish        | Online; App           | Living at Family<br>Home                       | N/A  | Single, pet owner   |
| Persona 2:<br>Family seeking<br>assistance                       | Resident                  | Middle  | Low    | Spanish                | Phone; In-Person      | Living at Family<br>Home / Unstable<br>Housing | Mobility Concerns<br>(Husband)                     | Married with three children                                   |
| Persona 3:<br>Young person<br>calling on behalf<br>of a relative | Resident<br>City Employee | Young   | Middle | English/<br>Vietnamese | Online;<br>Phone      | Renter with<br>Roommates                       | N/A  | Acting as Proxy for relative; City employee                   |
| Persona 4:<br>Elderly resident,<br>community<br>leader           | Resident                  | Elderly | High   | English                | All Channels          | Homeowner                                      | Mobility Concerns;<br>Technological<br>Constraints | Single (Widowed);<br>Neighborhood<br>Association Member       |
| Persona 5:<br>Employee at<br>property<br>development<br>business | Business                  | Middle  | Middle | English                | Phone; Email          | Homeowner                                      | N/A  | Married with two<br>children; Acting as<br>Proxy for Business |
| Persona 6:<br>Couple opening<br>a small<br>business              | Business                  | Middle  | Middle | Vietnamese             | Phone; In-Person      | Living at Family<br>Home                       | N/A  | Married; Small<br>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      |
|---------|--------------|---|--|---|-------------|
|         | <u>e</u>     | SJ311   | <b>Language Access:</b> 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 |
|         | People       | Comms   | <b>City Tools:</b> 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 |
|         |              | СМО   | <b>Partner Access:</b> 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   |
|         | SS           | SJ311   | <b>Information Uniformity:</b> Information was inconsistent across DOT webpages. Non-English language representation was not uniform.                                  | When customers went to the FAQ section of the DOT webpage,<br>information was inconsistent with other pages. The SJ311 and<br>Comms teams updated all relevant information.                               | Completed   |
|         | Proce        | Animal Care<br>Services &<br>SJ311  | <b>Staffing</b> : 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<br>Services   | <b>Phone Tree:</b> 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         | <b>Comms</b> 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<br>any gaps will be identified with the appropriate team. More time<br>and discussion will be needed to execute this item as a quick win. | Initiated   |
|         | Те           | SJ311   | <b>Transfers:</b> 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   |

7

## **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

- 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.

# Feedback and questions

Please reach out if you have any questions.

For questions:

Dolan Beckel, City Manager's Chief of Staff, City Manager's Office Erik Chiarella Jensen, Assistant to the City Manager, City Manager's Office Kia O'Hara, Program Manager, SJ311 Customer Contact Center, ITD