Memorandum

TO: HONORABLE MAYOR
AND CITY COUNCIL

FROM: Dolan Beckel

SUBJECT: SEE BELOW

DATE: February 24, 2023

Approved _[signature]_

Date **2/24/2023**

SUBJECT: **CITY INITIATIVES ROADMAP: CUSTOMER SERVICE VISION AND STANDARDS INITIATIVE REPORT**

RECOMMENDATION

Accept the report on the Customer Service Vision and Standards Initiative and approve the Customer Service Vision, Standards, recommendations, and performance management framework described in this memorandum, as part of the approved City Initiatives Roadmap for 2022-2023.

SUMMARY AND OUTCOME

The City Council will understand the scope, approach, current status, initiated "quick wins," and next steps in the Customer Service Vision and Standards Initiative to ensure staff can deliver excellent customer service to the City's residents, businesses, and visitors. The City Council will also understand and approve the Customer Service Vision, Standards, recommendations (subject to the future appropriation of funds, as appropriate), and performance management framework described in this memorandum and elaborated in the Attachment - City of San José: Customer Service Vision and Standards Initiative Detailed Report. As a result of the Customer Service Vision and Standards Initiative recommendations, and with their implementation, the City will have a foundation to better support customers at scale in accessing and navigating City services and receiving excellent customer service from all City touchpoints.

BACKGROUND

As one of the City Manager's Key Focus Areas, and as an initiative on the 2022-2023 City Initiatives Roadmap adopted by the City Council on May 16, 2022[1], the Customer Service Vision and Standards Initiative focuses on transforming the way that the City supports residents,

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

businesses, and visitors in accessing and navigating City services. The initiative also aligns with the City Manager's *One Team Leadership Values and Expectations* of "Quality and Excellent Customer Service."

On April 19, 2022[2], the City Council adopted a resolution authorizing the City Manager to negotiate and execute master consulting agreements with qualified strategic planning vendors for the Customer Service Vision and Standards Initiative. Given the City's current staffing challenges, and need for specific expertise, it was determined that external consultants were the best resourcing channel to pursue as external consultants could provide additional project-based capacity and new cross-industry knowledge related to customer service best practices. The consulting firm Guidehouse, Inc. (consultant) was the highest scoring bidder and was selected as the vendor to provide services for four initial tasks, all of which were completed as of December 2022. These four tasks are:

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.

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.

Task 3. **Formulate a Customer Service Vision and Standards.** Conduct strategic visioning and reporting sessions with 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.

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 Service 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

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

the City provides customer service. 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 impact 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 staff to refine high-level budget requests as part of the annual priority setting and budget process.

ANALYSIS

The following summarizes the results of work completed thus far including:
1. Discovery Process;
2. Current State and Analysis;
3. Customer Service Vision and Standards;
4. Recommendations;
5. Performance Management Framework; and
6. Multi-Year Transformation Plan and Interim Quick Wins Initiated.

A more comprehensive breakdown of the approach and results is found in the Attachment.

1. Discovery Process
As part of Task 1, staff and the consultant 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.

2. *Mystery Shopping,* in which the team examined customer service 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 and across various channels of customer service delivery.

3. *Call and Front Desk Observations,* in which the team listened to live and recorded calls and conducted front desk observations to understand customer service standard procedures and key customer issues.

4. *Phone and Virtual Outreach,* in which the team spoke with customers representing potential personas from City stakeholder referrals and at neighborhood association

meetings, and outreach to key customers from a list of customer referrals from City stakeholders.

5. *Intercept Interviews,* in which the team conducted brief, in-person intercept interviews at various locations across the City. 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 staff from across City departments to review, react to, and provide a service delivery perspective on customer service across representative personas and unique customer journeys.

2. Current State and Analysis

As part of Task 2, staff and the consultant identified representative customer personas composed of key attributes, behaviors, and scenarios that differentiate their journey using City services. The customer personas created are shown in Table 1, alongside some representative customer journeys accessed by those customers, capturing common pain points, bright spots, and insights at key moments within customer service delivery.

Table 1. Representative Customer Persona and Customer Journey

No.	Customer Persona (language preferences)	Customer Journey
1	Young college student (English/Spanish)	• How to report non-emergency property damage • How to adopt a pet
2	Family seeking assistance (English/Spanish)	• How to apply for affordable housing • How to enroll in a child care program
3	Young person, City employee, calling on behalf of a relative (English/Vietnamese)	• 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 (English)	• How to report an abandoned vehicle • How to abate overgrown vegetation
5	Employee at a property development business (English)	• How to get a status update on a building permit • How to report an encampment concern
6	Couple seeking to open a small business (Vietnamese)	• How to get a business tax certificate • How to obtain a business operation permit

The data and insights collected during the discovery process and current state and analysis were synthesized into people, process, and technology opportunities that informed the Customer Service Vision and Standards, Recommendations and Quick Wins Initiated, and Performance Management Framework.

3. Customer Service Vision and Standards

In pursuit of a unified purpose and meaning to guide customer service, staff and the consultant conducted several visioning sessions with a range of employees that were grounded in the context of the discovery process. Vision and Standards session themes focused on solutions, ease, transparency, consistency, reliability, accessibility, equity, empathy, and teamwork. As a result, the Customer Service Vision and Standards created are shown in Figure 1. Definitions of each Standard are provided in the Attachment.

Vision

Working together to serve our community through reliable, empathetic, and solutions-oriented customer service

Standards

1. Deliver customer service with a focus on solutions.

2. Support a consistent and accessible experience for all customers.

3. Work as one team to facilitate a seamless customer experience.

4. Enable customers to easily navigate the City on their first try.

5. Set expectations for next steps at point of contact and communicate along the journey.

6. Treat every customer like their problem matters and we are on the same team to solve it.

7. Continually improve our customer service through our people, processes, and technologies.

Figure 1. Customer Service Vision and Standards

4. Recommendations

The consultant defined five recommendation themes across people, process, and technology and 11 detailed recommendations for the City to achieve the Customer Service Vision and Standards. Each detailed recommendation was prioritized and sequenced for implementation and has a set of workplan steps, definitions, and measures of completion that will be used by staff in implementation over a multi-year timeframe. The themes and recommendations are listed in Table 2.

Table 2. Customer Service Vision and Standards Recommendations

Recommendation Theme	Detailed Recommendations
1. Culture and Training	Recommendation 1.1: Define and celebrate customer service excellence *(short term)*. Recommendation 1.2: Develop tools and training for improving internal and external connectivity and invest in customer service-related professional development opportunities *(long term)*.

2. Customer Service Governance Centralization	Recommendation 2.1: Centralize governance and distribute operations for customer service *(long term)*.
3. Equitable Access	Recommendation 3.1: Ensure customers can access a full journey in-language *(short term)*. Recommendation 3.2: Strengthen in-person resources to help customers better navigate the City *(short term)*. Recommendation 3.3: Optimize outreach campaigns to engage and educate residents.
4. Policies and Processes	Recommendation 4.1: Establish clear policies on communication and expectation setting throughout the customer journey *(short term)*. Recommendation 4.2: Define and build quality assurance processes for customer service *(long term)*.
5. Channels, Software, and Data	Recommendation 5.1: Optimize current phone and online channels to improve accessibility and ease *(short term)*. Recommendation 5.2: Procure a Customer Relationship Management solution to centralize customer data collection, tracking, and sharing *(long term)*. Recommendation 5.3: Establish consistent metrics and leverage data to identify areas for improvement for customer service *(long term)*.

5. Performance Management Framework
Staff and the consultant created a performance management framework to support the City in achieving the Customer Service Vision and Standards. The performance measures identified are distinguished between near-term (defined as measures that the City collects today or could be measured today using current capabilities) and long-term (defined as measures that would need to be modified or a collection method created with new capabilities). Table 3 summarizes the near-term and long-term performance measures planned to measure the impact and success of the Customer Service Vision and Standards.

Table 3. Customer Service Vision and Standards Performance Management Framework

Customer Service Vision	
Near-Term	Percent of customers surveyed who answered "very satisfied" with overall customer experience
Long-Term	Percent of customers surveyed who answered "very satisfied" with overall customer experience
Standard 1. Deliver customer service with a focus on solutions	
Near-Term	Percent of phone calls resolved on first call (SJ311 Contact Center)
Long-Term	Percent of phone calls resolved on first call (citywide)

Standard 2. Support a consistent and accessible experience for all customers	
Near-Term	Percent of customers that engaged with City employees in their preferred language and using their preferred channel
Long-Term	Percent of customers that were able to reach a resolution in their preferred language and using their preferred channel
Standard 3. Work as one team to facilitate a seamless customer experience	
Near-Term	Percent of customers who felt their experience engaging with the City was seamless
Long-Term	Rate of points of contact experienced to reach a resolution per customer
Standard 4. Enable customers to easily navigate the City on their first try	
Near-Term	Percent of customers who were very satisfied with their experience contacting someone in the City
Long-Term	Percent of customers who felt the effort required to contact the City was very easy
Standard 5. Set expectations for next steps at point of contact and communicate along the journey	
Near-Term	Percent of customers who were "very satisfied" with the timeliness of the response
Long-Term	Percent of inquiries that received a response/next steps at point of contact
Standard 6. Treat every customer like their problem matters and we are on the same team to solve it	
Near-Term	Percent of customers who are "very satisfied" with the courtesy, competency, and cooperation of City employees
Long-Term	Percent of customers that would be very willing to contact the City again
Standard 7. Continually improve our customer service through our people, process, and technologies	
Near-Term	Percent of employees that feel they have the tools they need to facilitate a positive customer experience
Long-Term	Percent of employees engaged in people, process, and technology improvements

6. Multi-Year Transformation Plan and Interim Quick Wins
As a result of this work, the City has a multi-year transformation plan to achieve the Customer Service Vision and Standards, recommendations, and performance management framework. The transformation plan spans approximately three- and one-half years in two phases:
1. Interim quick wins delivered through the end of 2023-2024 with existing staffing and remaining allocated funding; and
2. Major transformational work of business process design, organizational alignment, and implementation of a citywide Customer Relationship Management System delivered over three years. Funding for this phase of the transformation plan will be included as part of the 2023-2024 and future Budget processes, as appropriate and as resources allow.

In the interim, numerous quick wins for improving customer service delivery were identified during discovery activities. These are small scale actions across people, process, and technology

opportunities that the City can take to improve customer service leveraging existing priorities, budget resources, and staff capacity. As such, progress has begun to address issues identified in the discovery phase. Table 4 highlights several interim quick win summaries by service area and customer issue resolved.

Table 4. Customer Service Vision and Standards Interim Quick Wins

No.	Service	Customer Service Issue	Quick Win Summary	Status
1	SJ311	Language Access: Spanish speakers using the SJ311 live chat option 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 a translation application.	In progress
2	Communications	City Tools: Some employees are unaware of citywide access to translation services.	Communications distributed a citywide email to staff to educate them on these services and connect to support resources.	Complete
3	City Manager's Office	Partner Access: A key City partner was feeling disconnected from, and unaware of, a variety of City services for which they were in need.	The City connected the partner to a variety of resources and relationships, including COVID-19 Recovery, Economic Development, Cultural Affairs, and Community Energy services.	Complete
4	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
5	Department of Transportation / SJ311	Information Uniformity: Information was inconsistent across Department of Transportation webpages. Language representation was not uniform.	The SJ311 and Communications teams worked to update all relevant information.	Complete

6	Animal Care and Services / SJ311	Staffing: Customers calling Animal Care and Services that were being rerouted to SJ311 were left unanswered at specific times due to competing team meetings.	Reduced SJ311 team meeting length to decrease windows of workday times when reps are unavailable. SJ311 updated training for overflow partners so there is always a rep available.	Complete
7	Animal Care and Services	Phone Tree: The Animal Care and Services phone line was routing all non-emergency 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
8	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
9	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., Department of Transportation).	Complete
10	SJ311	Departmental Transfers: Customers contacting SJ311 often need to be transferred to a City department to resolve a request.	SJ311 is working towards a warm hand-off model, where a customer needing departmental transfer can move forward with the context of their request to minimize frustration and repetition.	In progress
11	SJ311	Customer Relationship Management System Consolidation: Multiple systems exist across departments, creating variation and fragmented customer service delivery.	The Information Technology Department is exploring an early analysis of consolidating two different instances of a Customer Relationship Management system into a single instance to reduce costs.	In progress

EVALUATION AND FOLLOW-UP

City staff will continue to implement interim Phase 1 quick wins that can be done within current priorities, resources, budget, and staff capacity. This work includes using the remaining budget of the existing $600,000 allocation to implement some of the highest-priority recommendations.

The Administration will also bring forward solutions-oriented recommendations along with resource considerations as part of the 2023-2024 Budget process to begin Phase 2 of the Customer Service Vision and Standards work.

COORDINATION

This memorandum was 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.

PUBLIC OUTREACH

This memorandum will be posted on the City's Council Agenda website for the March 7, 2023 City Council meeting.

Community engagement and public outreach was conducted as part of Task 1, including engagement 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.

COMMISSION RECOMMENDATION AND INPUT

No commission recommendation or input is associated with this action.

CEQA

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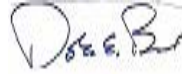
PUBLIC SUBSIDY REPORTING

This item does not include a public subsidy as defined in section 53083 or 53083.1 of the California Government Code or the City's Open Government Resolution.

DOLAN BECKEL
Chief of Staff for the City Manager,
City Manager's Office

For questions, please contact Erik Chiarella Jensen, Assistant to the City Manager, at erik.jensen@sanjoseca.gov.

ATTACHMENT: City of San José: Customer Service Vision and Standards Initiative Detailed Report

City of San José: Customer Service Vision and Standards

Detailed Report

March 7, 2023

Customer Service Standards Project Overview

The City engaged Guidehouse over four tasks to address customer service opportunities

PURPOSE

The City of San José is seeking to understand and assess person-to-person customer service across the City and assist in developing a comprehensive Customer Service Vision, set of standards, and actionable recommendations for improvement.

INPUTS

Internal City Engagement

- Department interviews
- Document review
- Mystery shopping
- Leading practices

External Customer Engagement

- Customer interviews
- Customer intercepts
- Call observations
- Desk observations
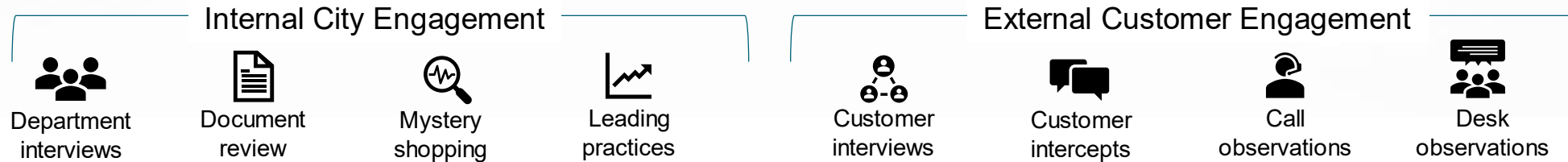
PROJECT TASKS

- **Task 1 – Discovery.** *Current state review, internal City engagement, external customer engagement.*
- **Task 2 – Mapping the Current State.** *Representative customer personas, data-driven journey maps.*
- **Task 3 – Vision and Standards.** *Collaborative visioning, customer service standards development.*
- **Task 4 – Future State Mapping and Transformation.** *Future state journey map, gap analysis, recommendations and quick wins, transformation plan and cost estimate, performance management framework.*

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Discovery Inputs

We engaged 416 internal and external stakeholders over 5 engagement methods

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

Internal Staff Engagement — *Indirect Constituent Engagement* — *Direct Constituent Engagement*

Discovery Themes – Overview

San José has opportunities across culture, operations, and tech to improve customer service

People

City staff often do not leverage collaboration across Departments or take extra steps to problem solve for customers.

Many customers felt customer service was inconsistent depending on who they reached out to.

Process

Inconsistent and complex policies and processes across Departments resulted in a fragmented, lengthy, and ineffective customer experience.

Customers without deep familiarity of City services struggle to navigate towards a resolution.

Technology

The City does not currently have the technology to retrieve, process, track, coordinate, and ensure follow through on customer inquiries.

The lack of centralized data collection and metrics leads to a fragmented understanding of customers.

The City's current state of customer service delivery creates challenging and at times insurmountable barriers for residents and businesses in accessing the services that they need.

Customer Journey – Key Phases

The customer journey is broken down into five key stages

Awareness
Prior to engaging with the City, the customer is aware of services and has an idea of how to connect with the City, what their needs are, and whether they need a solution.

Information Seeking
The customer researches a point of contact to connect with the City to address their need and uses a selected channel (in-person, email, 311 phone, SJ311, call center, dispatch) to reach out to the City.

Engagement
The customer service representative receives the information and either provides a solution, transfers the customer, or provides contact information for another Department.

Service Delivery
The customer directly engages with a City Department to receive a service or solution.

Resolution
The City provides updates to the customer and the issue is resolved and/or closed.

Current State Customer Journey – Representative Bright Spots

Our discovery identified bright spots across every step of the customer journey

Customer is provided bilingual representatives who can switch to their preferred language.

"I used 311 before and felt they were pleasant and efficient." –Intercept #12, Mayfair Community Center

Customers that have used SJ311 thought the process was easy and convenient.

Information Seeking

Engagement

Resolution

Customer has an awareness of City services through personal experience or through personal connections (e.g., Neighborhood association leaders, community center, library, neighbors, family, friends, etc.)

END: Customer has accomplished what they wanted.

START: Customer needs support.

Awareness

Reps feel connected to the community and feel a sense of pride in supporting customers.

Customers were appreciative of the programming and services provided and praised the quality of these programs.

"It's pretty nice – there's a pool, field trips, and movies. My grandson goes to camp here. We live nearby and come often." – Intercept #11, Mayfair Community Center

"[I] interact mostly with the website and app… [I] like the chat feature online and makes using the City website easier." – Intercept #60, Bascom

FAQ section is available on the front page of the City website and helps customers locate information quickly.

"The people are helpful; unlike other places I've lived where sometimes the attitude is 'what do you want' – there is more a sense of 'how can I help you' from San José." – Intercept #78, Dai Thanh Supermarket

Service Delivery

When being transferred **within** departments, customers felt they were given enough information and knew how to proceed.

Current State Customer Journey – Representative Pain Points

Our discovery identified pain points across every step of the customer journey

The customer has challenges reaching a human representative who speaks their preferred language.

"Language access on phone calls is too limited - needs Chinese speakers. – Intercept Interview #34

Information Seeking

Engagement

The customer reaches the wrong Department when calling. The rep does not provide actionable next steps nor a warm transfer.

Resolution

END: Customer is hesitant to reach out to the City in the future.

The customer has low familiarity with City services and does not have the time and resources to figure out the process, which puts them at a disadvantage from the start of their journey.

Reps do not have visibility into the customer's previous touchpoints, so the customer must repeat their inquiry.

Several months pass without the customer hearing back from the City.

START: Customer needs support.

Awareness

"If I needed something I'd just give up because I wouldn't know who to call." – Intercept #155, Farmer's Market

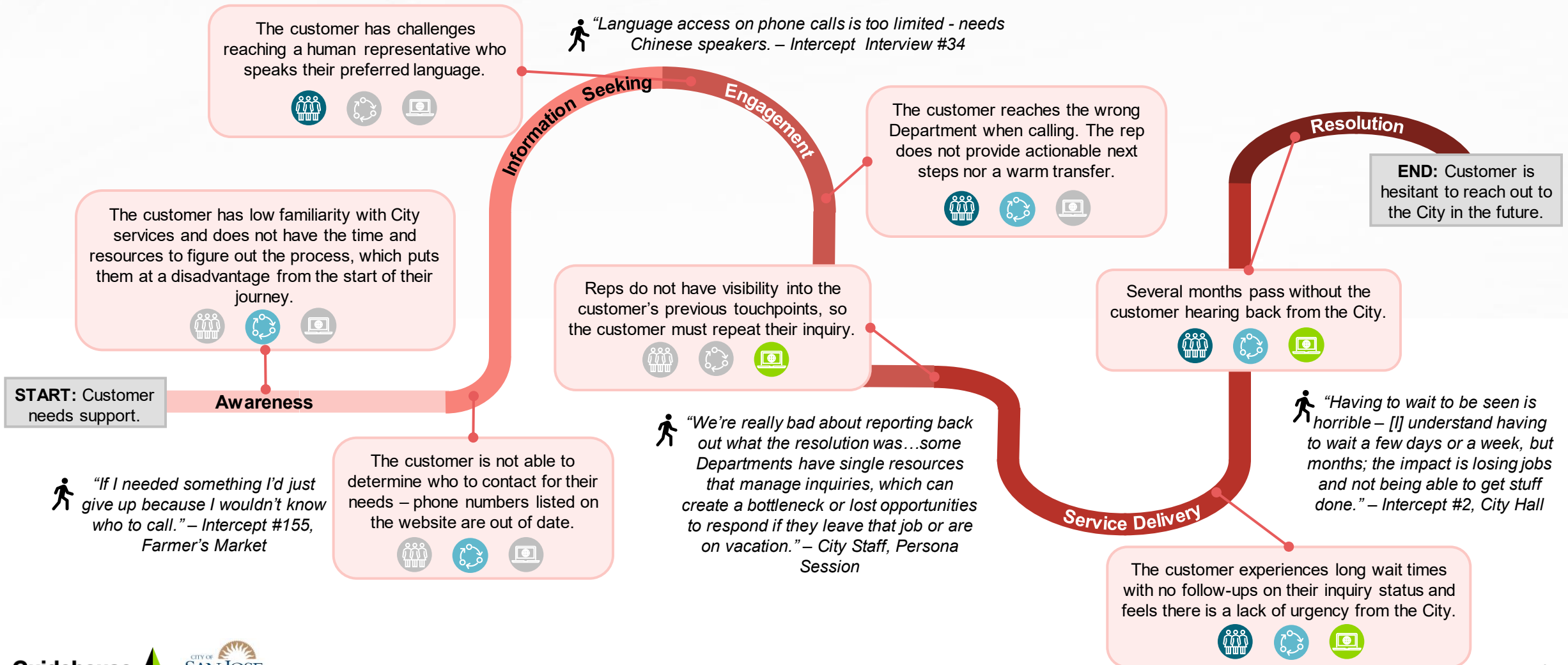The customer is not able to determine who to contact for their needs – phone numbers listed on the website are out of date.

"We're really bad about reporting back out what the resolution was…some Departments have single resources that manage inquiries, which can create a bottleneck or lost opportunities to respond if they leave that job or are on vacation." – City Staff, Persona Session

Service Delivery

"Having to wait to be seen is horrible – [I] understand having to wait a few days or a week, but months; the impact is losing jobs and not being able to get stuff done." – Intercept #2, City Hall

The customer experiences long wait times with no follow-ups on their inquiry status and feels there is a lack of urgency from the City.

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8

Customer Service Vision and Standards

Customer Service Vision and Standards

Standards are guidelines for City employees to deliver customer service and achieve the vision

Vision

Working together to serve our community through reliable, empathetic, and solutions-oriented customer service

Standards

1. Deliver customer service with a focus on solutions.

2. Support a consistent and accessible experience for all customers.

3. Work as one team to facilitate a seamless customer experience.

4. Enable customers to easily navigate the City on their first try.

5. Set expectations for next steps at point of contact and communicate along the journey.

6. Treat every customer like their problem matters and we are on the same team to solve it.

7. Continually improve our customer service through our people, processes, and technologies.

Customer Service Standards – Definitions

Standards were developed based on discovery research and staff visioning workshops

1. Deliver customer service with a focus on solutions. It may not always be possible to say "yes," but we will aim to complete customer inquiries from beginning to end where possible. We will avoid handing off issues to other Departments and practice innovative and creative thinking when solving issues. We want our customers to know we tried our best to help them achieve their goals.

2. Support a consistent and accessible experience for all customers. Our customers are diverse - in preferred language, technology proficiency, preferred communication channel, level of trust in the government, and so much more. It is our job to meet the customers where they are to ensure they can engage with the City in accordance with their preferences and needs, including providing an end-to-end experiences in their preferred language and channel. We will ensure that all customers are serviced fairly and effectively by following the standard protocols and processes to help them reach their goals.

3. Work as one team to facilitate a seamless customer experience. Many customer inquires are complex and may require engagement across several Departments. In order to provide the best information possible information to our customers, we need to understand each other and practice open communication. If a customer needs to be transferred, we will do our due diligence to make sure they are transferred to the right person, and that person should be given enough information to ensure a seamless transition. Customers should feel like they are working with one City, no matter where they receive service.

4. Enable customers to easily navigate the City on their first try. For many customers, our online presence is their entryway to the City and its services. We will ensure that information is accurate and up-to-date on our website and publicly-facing materials and that in-depth knowledge about City processes is not required to navigate the website. For people that prefer to speak with a person, phone trees and processes are set up so that customers are connected to a human on their first try. No matter which entry point customers choose, each channel should lead towards a resolution.

5. Set expectations for next steps at point of contact and communicate along the journey. Many solutions or services cannot be provided in a day, but we will strive to acknowledge the request or provide customers with next steps and expected timelines the same day. When transferring between departments or external organizations on a singular customer inquiry, we will provide clear and concise directions and expectations for completing the task at hand. When setting expectations with the customer, we will be honest, transparent, and accountable. We want customers to feel like they know where they are in the journey and where they are going.

6. Treat every customer like their problem matters and we are on the same team to solve it. A customer's first impression of the City can be based on the attitude, etiquette, and/or knowledge of the representative that picks up the phone or answers the email. We will interact with every customer in an empathetic, kind, positive, and productive way. We want to reassure our customers and put them at ease.

7. Continually improve our customer service through our people, processes, and technologies. On an individual and organization-wide level, we will strive to identify and improve San José's policies, programs, and decision-making towards improved outcomes for all San José residents. We will listen to our customers and seek customer feedback to understand their needs and barriers. We will strive to pursue the best practices available and regularly review our operations and technology to ensure we are providing the best experience possible.

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![Guidehouse logo — Outwit Complexity]

Recommendations, Performance Management, and Multi-Year Transformation Plan

Vision, Standards, and Recommendations Framework

The recommendations support San José in achieving its Customer Service Vision and Standards

Vision

Working together to serve our community through reliable, empathetic, and solutions-oriented customer service

Standards

1. Deliver customer service with a focus on solutions.

2. Support a consistent and accessible experience for all customers.

3. Work as one team to facilitate a seamless customer experience.

4. Enable customers to easily navigate the City on their first try.

5. Set expectations at point of contact and communicate along the journey.

6. Treat every customer like their problem matters and we are on the same team to solve it.

7. Continually improve our customer service through our people, processes, and technologies.

Recommendations

People

Culture & Training

Governance Centralization

Process

Equitable Access

Policies & Processes

Technology

Channels, Software & Data

3 Detailed Recommendations

5 Detailed Recommendations
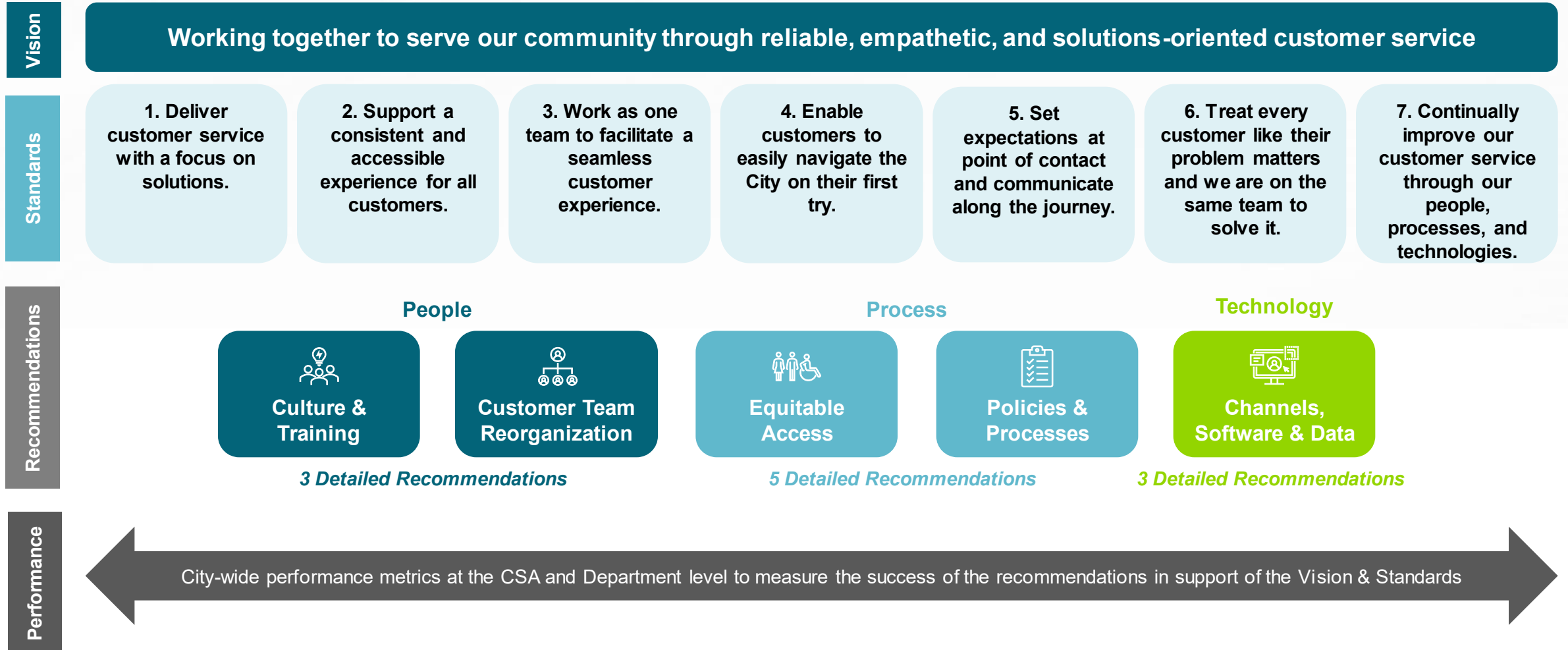
3 Detailed Recommendations

Detailed Recommendations

The five themes each have detailed recommendations that are broken out into sub-steps

Recommendation Theme	Detailed Recommendations	# of Steps
1. **Culture & Training**: Define a unified and consistent culture of customer service across the City so staff feel empowered to make decisions that lead to quality customer service.	**Recommendation 1.1:** Define and celebrate customer service excellence (*short term*). **Recommendation 1.2:** Develop tools and training for improving internal and external connectivity and invest in customer service-related professional development opportunities (*long term*).	8
2. **Customer Team Reorganization**: Centralized governance and support for customer service.	**Recommendation 2.1:** Centralize governance and distribute operations for customer service (*long term*).	2
3. **Equitable Access**: Implement measures to ensure equitable access throughout the customer service journey.	**Recommendation 3.1**: Ensure customers can access a full journey in-language (*short term*). **Recommendation 3.2:** Strengthen in-person resources to help customers better navigate the City (*short term*). **Recommendation 3.3:** Optimize outreach campaign to engage and educate residents (*short term*).	6
4. **Policies & Processes**: Develop policies to improve processes throughout the customer experience.	**Recommendation 4.1:** Establish clear policies on communication and expectation setting throughout the customer journey (*short term*). **Recommendation 4.2:** Define and build quality assurance processes for customer service (*long term*).	7
5. **Channels, Software & Data**: Improve existing channels, procure new infrastructure to process customer inquiries on a City-wide level, and use data-insights to identify and improve the customer experience.	**Recommendation 5.1:** Optimize current phone and online channels to improve accessibility and ease (*short term*). **Recommendation 5.2:** Procure a Customer Relationship Management (CRM) solution to centralize customer data collection, tracking, and sharing (*long term*). **Recommendation 5.3:** Establish consistent metrics and leverage data to identify areas for improvement for customer service (*long term*).	19

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Multi-Year Transformation Plan Framework

The transformation plan supports San José in achieving its Customer Service Vision and Standards

Vision

> Working together to serve our community through reliable, empathetic, and solutions-oriented customer service

Standards

| 1. Deliver customer service with a focus on solutions. | 2. Support a consistent and accessible experience for all customers. | 3. Work as one team to facilitate a seamless customer experience. | 4. Enable customers to easily navigate the City on their first try. | 5. Set expectations at point of contact and communicate along the journey. | 6. Treat every customer like their problem matters and we are on the same team to solve it. | 7. Continually improve our customer service through our people, processes, and technologies. |

Recommendations

People

| Culture & Training | Customer Team Reorganization |

Process

| Equitable Access | Policies & Processes |

Technology

| Channels, Software & Data |

3 Detailed Recommendations   *5 Detailed Recommendations*   *3 Detailed Recommendations*

Performance

City-wide performance metrics at the CSA and Department level to measure the success of the recommendations in support of the Vision & Standards

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Performance Management Framework

The framework measures success against the Customer Service Vision and Standards

Vision

Working together to serve our community through reliable, empathetic, and solutions-oriented customer service

Standards

| 1. Deliver customer service with a focus on solutions. | 2. Support a consistent and accessible experience for all customers. | 3. Work as one team to facilitate a seamless customer experience. | 4. Enable customers to easily navigate the City on their first try. | 5. Set expectations at point of contact and communicate along the journey. | 6. Treat every customer like their problem matters and we are on the same team to solve it. | 7. Continually improve our customer service through our people, processes, and technologies. |

Performance Measures (long-term)

Percent of customers surveyed who answered "very satisfied" with overall customer experience

| 1. Percent of phone calls resolved on first call. | 2. Percent of customers that were able to reach a resolution in their preferred language and using their preferred channel. | 3. Rate of points of contact experienced to reach a resolution per customer. | 4. Percent of customers who felt the effort required to contact the City was very easy. | 5. Percent of inquiries that received a response/next steps at point of contact. | 6. Percent of customers that would be very willing to contact the City again. | 7. Percent of employees engaged in people, process, and technology improvements. |

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Interim Quick Wins Initiated

Service Area		Customer Issue	Quick Win Summary	Status
People	SJ311	**Language Access:** Spanish speakers using the SJ311 live chat option 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 a translation application.	In progress
People	Comms	**City Tools:** Some employees are unaware of citywide access to translation services.	Communications distributed a citywide email to staff to educate them on these services and connect to support resources.	Complete
People	CMO	**Partner Access:** A key City partner was feeling disconnected from, and unaware of, a variety of City services for which they were in need.	The City connected the partner to a variety of resources and relationships, including COVID-19 Recovery, Economic Development, Cultural Affairs, and Community Energy services.	Complete
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.	Complete
Process	DOT and SJ311	**Information Uniformity:** Information was inconsistent across DOT webpages. Language representation was not uniform.	The SJ311 and Communications teams worked to update all relevant information.	Complete
Process	Animal Care and Services and SJ311	**Staffing:** Customers calling Animal Care and Services that were being rerouted to SJ311 were left unanswered at specific times due to competing team meetings.	Reduced SJ311 team meeting length to decrease windows of workday times when reps are unavailable. SJ311 updated training for overflow partners so there is always a rep available.	Complete
Process	Animal Care and Services	**Phone Tree:** The Animal Care and Services phone line was routing all non-emergency 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
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.	In progress
Tech	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., Department of Transportation).	Complete
Tech	SJ311	**Departmental Transfers:** Customers contacting SJ311 often need to be transferred to a City department to resolve a request.	SJ311 is working towards a warm hand-off model, where a customer needing departmental transfer can move forward with the context of their request to minimize frustration and repetition.	In progress
Tech	SJ311	**Customer Relationship Management System Consolidation:** Multiple systems exist across departments, creating variation and fragmented customer service delivery.	IT is exploring an early analysis of consolidating two different instances of a CRM into a single instance to reduce costs.	In progress

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