

# Item 3.4 City Initiatives Roadmap: Customer Service Vision and Standards Initiative Report

March 7, 2023

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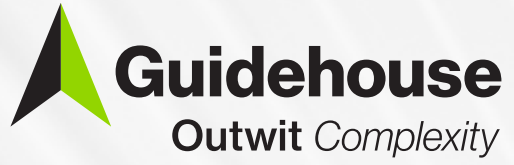
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# Agenda

- Initiative Background and Approach
- Discovery Overview
- Customer Service Vision and Standards
- Recommendations, Performance Management, and Multi-Year Transformation Plan
- Interim Quick Wins Initiated
- Next Steps



# City of San José: Customer Service Vision and Standards

**Detailed Report**

March 7, 2022



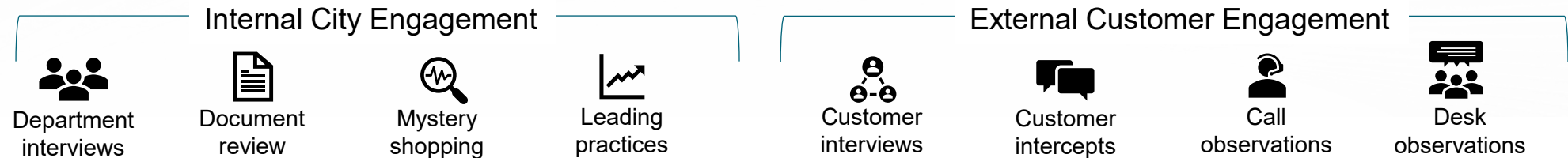
# Customer Service and Standards Initiative Approach

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



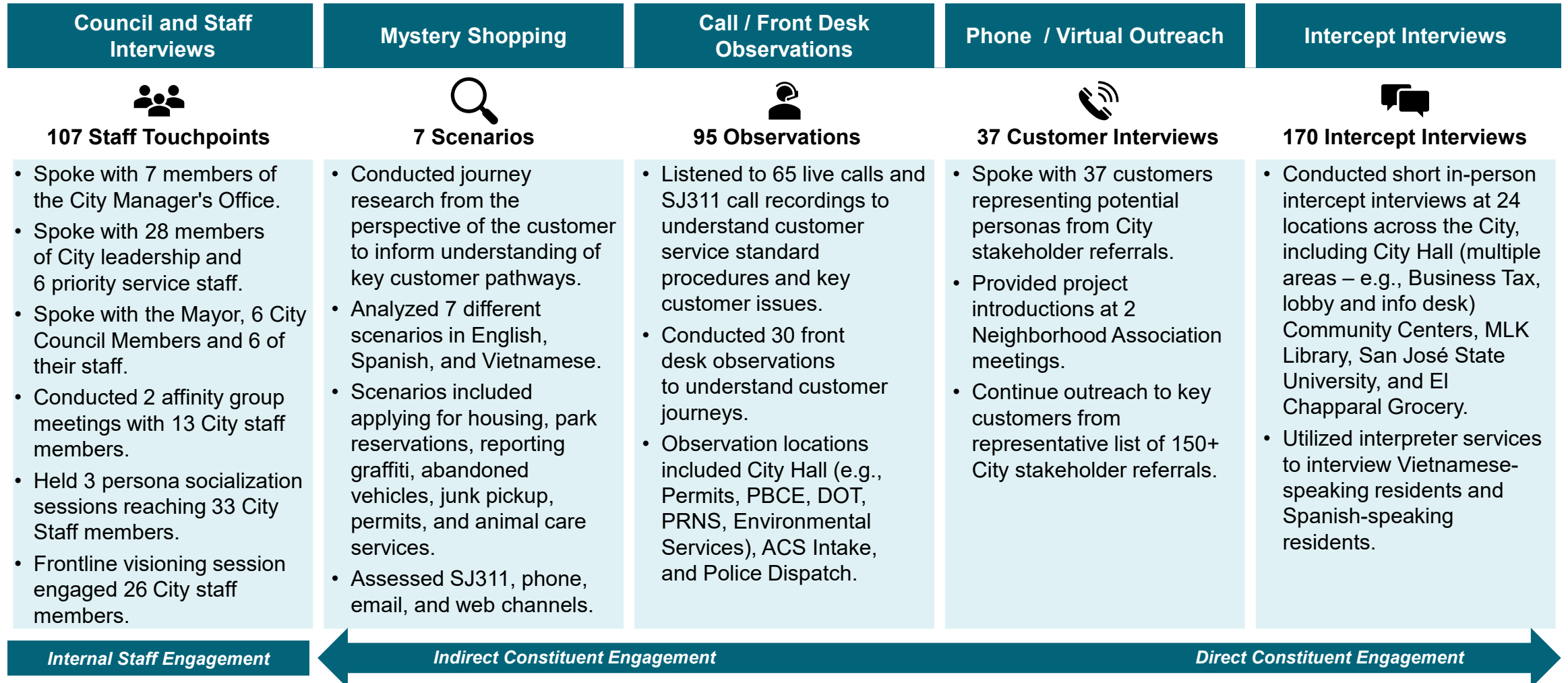
## PROJECT TASKS

- **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.*

# Discovery Overview

# Discovery Inputs

We engaged 416 internal and external stakeholders over 5 engagement methods





# 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



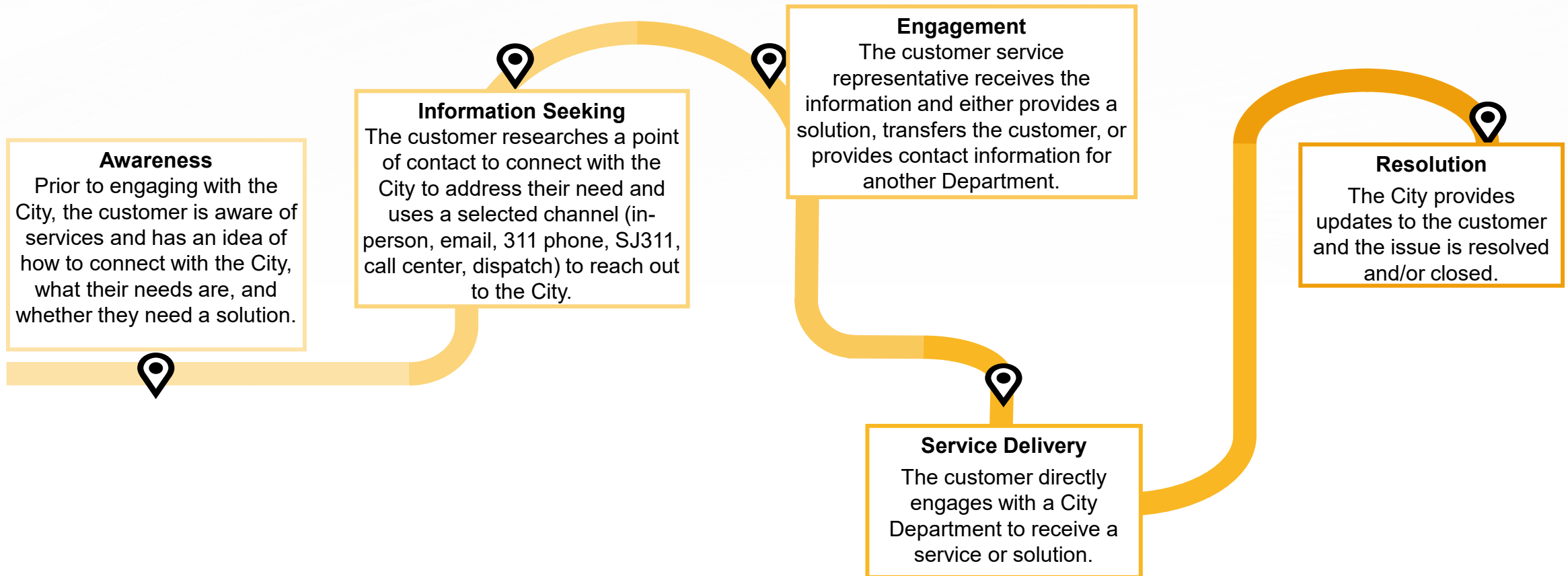
The City does not currently have the technology to retrieve, process, track, coordinate, and ensure follow through on customer inquiries.

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

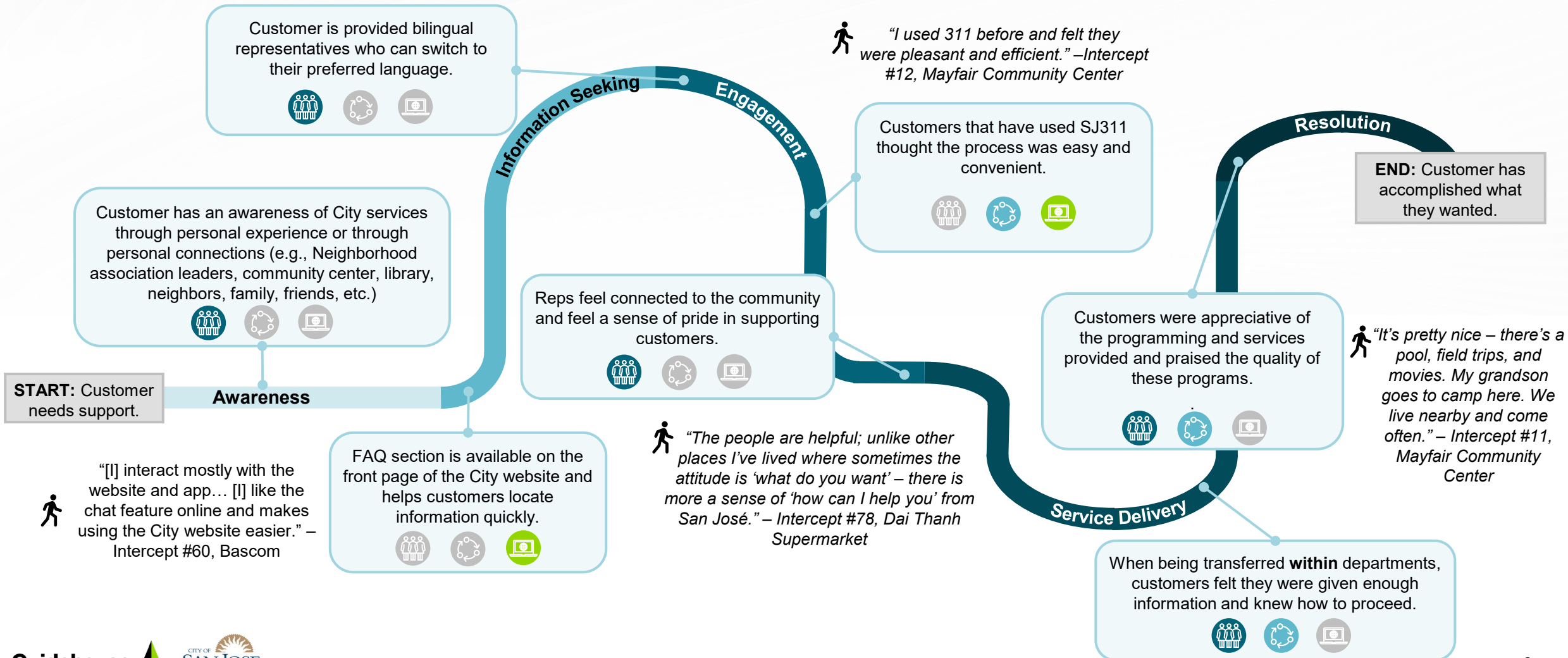
The customer journey is broken down into five key stages





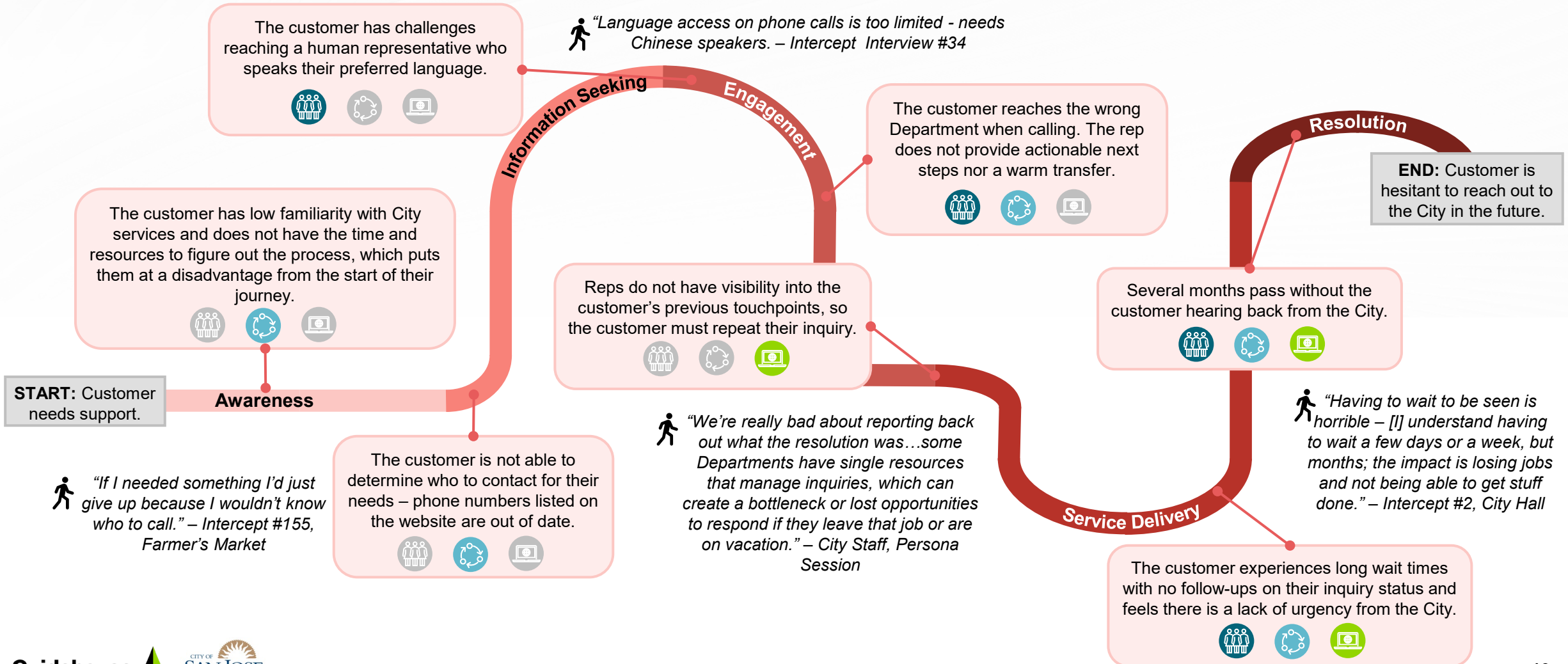
# Current State Customer Journey – Representative Bright Spots

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



# Current State Customer Journey – Representative Pain Points

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



# 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 inquiries are complex and may require engagement across several Departments. In order to provide the best information possible 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.

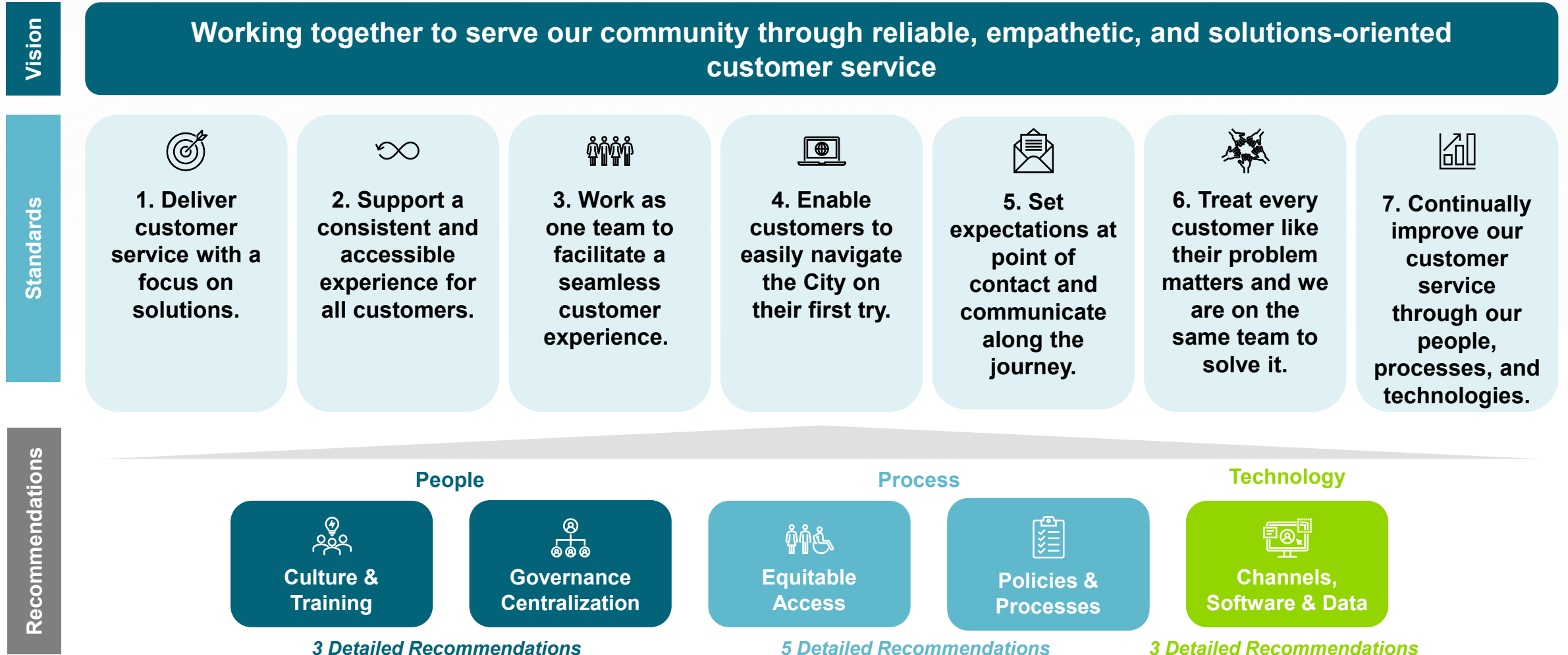


# Recommendations, Performance Management, and Multi-Year Transformation Plan



# Vision, Standards, and Recommendations Framework

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



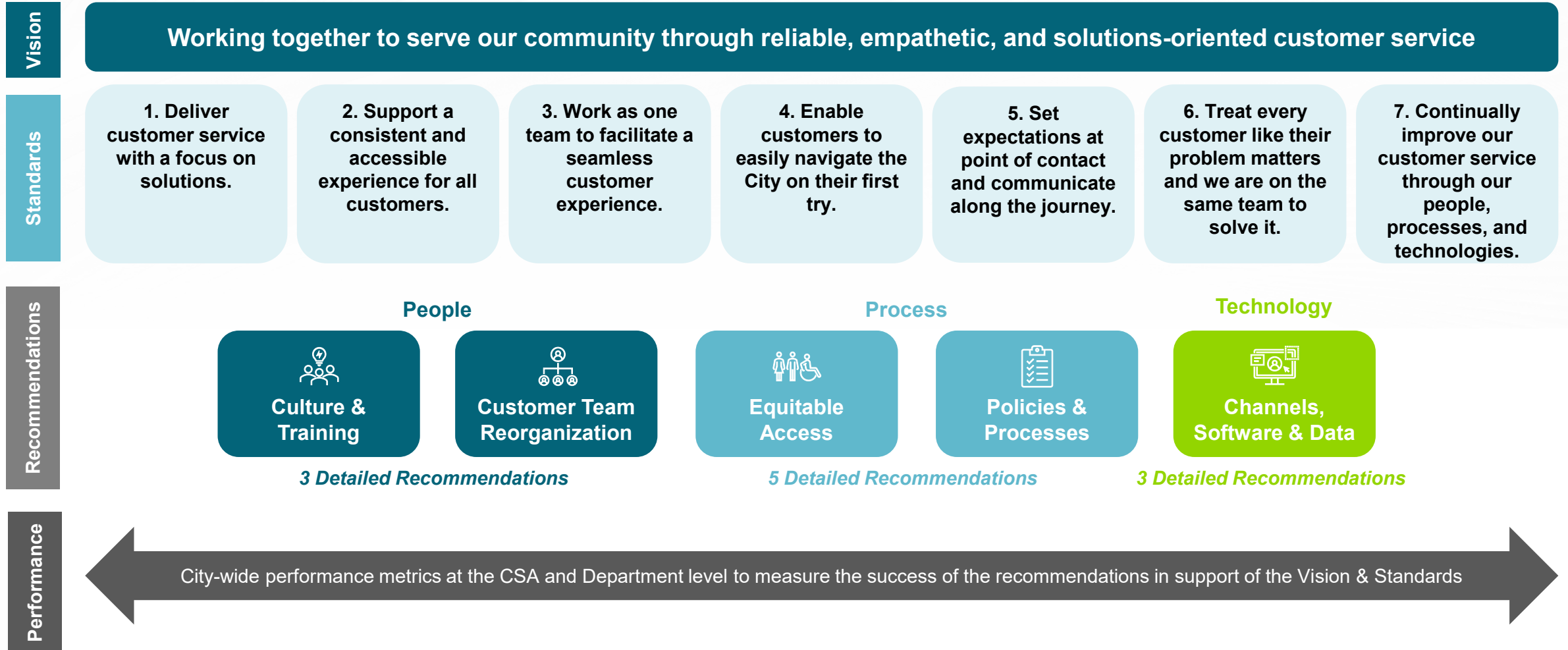
# Detailed Recommendations

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

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

# Multi-Year Transformation Plan Framework

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



# Performance Management Framework

Vision

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

Standards

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

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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.

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

Performance Measures

Near-Term

1. Percent of phone calls resolved on first call (SJ311 Contact Center).

2. Percent of customers that engaged with City employees in their preferred language and using their preferred channel.

3. Percent of customers who felt their experience engaging with the City was seamless.

4. Percent of customers who were very satisfied with their experience contacting someone in the City.

5. Percent of customers who were “very satisfied” with the timeliness of the response.

6. Percent of customers who are “very satisfied” with the courtesy, competency, and cooperation of City employees.

7. Percent of employees that feel they have the tools they need to facilitate a positive customer experience.

Long-Term

1. Percent of phone calls resolved on first call (citywide).

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.

# Interim Quick Wins Initiated



Service Area	Customer Issue	Quick Win Summary	Status
People	<b>SJ311</b> <b>Language Access:</b> 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
	<b>Comms</b> <b>City Tools:</b> 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
	<b>CMO</b> <b>Partner Access:</b> 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	<b>SJ311</b> <b>Language Access:</b> The hold message of the SJ311 phone tree was not translated to Spanish.	Spanish SJ311 hold message was added to the phone tree.	Complete
	<b>DOT and SJ311</b> <b>Information Uniformity:</b> Information was inconsistent across DOT webpages. Language representation was not uniform.	The SJ311 and Communications teams worked to update all relevant information.	Complete
	<b>Animal Care and Services and SJ311</b> <b>Staffing:</b> 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
	<b>Animal Care and Services</b> <b>Phone Tree:</b> 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	<b>Comms</b> <b>Language Access:</b> 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
	<b>SJ311</b> <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., Department of Transportation).	Complete
	<b>SJ311</b> <b>Departmental Transfers:</b> 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
	<b>SJ311</b> <b>Customer Relationship Management System Consolidation:</b> 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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