Customer Service Plan

Plan Background:

In creating the City of Tulsa's ("City") AIM Plan, City leaders established a goal to deliver quality world-class services that meet the needs of Tulsans. One of the strategies to achieve that goal is to regularly engage with customers to better understand their needs and satisfaction with services. To begin this work, Citywide customer service principles needed to be developed.

The Mayor's Office and Customer Care Department recognized a need to ensure that the principles established resonated with all City employees and their work groups. In June 2018, a team of employees representing every City department was created. The team completed the following:

- Reviewed best practices for delivering great customer service for both governments and for-profit businesses.
- Reviewed results of historical citizen satisfaction surveys to understand historical citizen satisfaction and preferences regarding getting information from the City.
- Conducted a survey of City employees to learn from them about what was working well and what needed improvement in customer service. 450 employees completed the survey.
- Conducted focus groups with different employees representing a cross-section of employee classifications, including front-line staff, managers and senior leaders.

What we learned in this work

What Customers Expect

- *Seamless interactions* – Customers are understanding when someone doesn't have all the answers, but they expect the organization to be capable of getting them to where they need to go with the least amount of effort on the customer's part. They don't want to be transferred from employee to employee until the right person is found. The customer expects to be transferred to the proper person to discuss their issue or question.
- *Accessibility of information* – Customers want to be able to access rules and information. If the City is going to apply rules and policies, they want to be able to see those and feel confident that the rules are applied fairly. They want information to be jargon-free, up to date, and shared in a way that they can understand.
- *Services promised should be delivered consistently* – Customers want to know that when we say we will do something, it gets done. They want to know that we won't stop working for them until we've delivered what they need.

Strengths we can build on

- *Customer Care* – The fact that we have a centralized customer service team is seen as beneficial. A single phone number – 311 – and the mobile app are great tools to make it easier for customers to engage with us and resolve issues.
- *Employees* – City employees are service oriented. When they are empowered, they will always go above and beyond to take care of customers and meet expectations.

Weaknesses we need to address

- *Organization is complex and difficult to navigate* – Employees struggle to know what team or department is responsible for different things. They aren't aware of the larger systems they represent, and they don't know how to help customers navigate those systems.
- *Knowledge Management* – Information about policies and procedures is not shared and updated systematically. It is difficult to know where to find information about how a process should be completed and who to refer someone to when they have a problem.
- *Unclear Expectations* – Employees are not sure what level of service or response is required of them. They want to succeed but are not clear on what is specifically expected of them and how to measure success.
- *Training* – Employees are provided customer service training at the onset of employment, but many never receive additional customer service training. Dealing with different types of customers, many of whom are not happy to interact with City government, is challenging and employees need continuous reinforcement of the skills and tools they learn in customer service training.

The Customer Service Principles Plan

Execution of this plan should improve customer service within the City in the next two years. The plan includes (1) principles that should be followed by all City employees, (2) strategies and specific actions to be undertaken to improve services, (3) metrics to track strategy success, and (4) guidelines to **measure satisfaction of both internal and external customers** for all City departments.

City Customer Service Principles

Principle	What it means to us and how we exhibit it.
Knowledge	Knowledgeable employees are empowered to deliver excellent customer service • We provide employees with information and training covering all aspects of the City, so they are familiar with the range of products and services we offer. • We see each customer contact as an opportunity to educate our customers and employees.
Accessibility	We provide services and facilities that are easy to use and meet our customers' needs. • We maintain convenient hours of operation and location of service facilities. Waiting time to receive service is not extensive and key areas are staffed during lunches and breaks. • We provide access to information and services by phone, email, website, and in-person. • We update our voicemail, email, and electronic calendars to reflect availability. We advise reception personnel when we will be out of the office. • We strive to simplify and standardize all forms and correspondence so that they are easy to use and understand. We maintain our website so that it is easy to navigate, accurate, and up-to-date.
Consistency	We use efficient, consistent, and effective approaches to meet customer expectations. We apply policies and requirements consistently and fairly. • We perform our services on time, on budget, and as promised. • We ensure compliance with legal requirements when handling sensitive information. • We establish targets for how we provide services and resolutions to customer issues.
Transparency	We ensure that our adopted laws, policies, guidelines, standards and processes are up to date and accessible to all. • Customer feedback can be provided in a variety of ways including calling 311, utilizing the 311 app or online so that customers can tell us how we are doing and what improvements we can make to our service. • We post our policies and procedures online as well as in City facilities. • We post the results of customer satisfaction surveys. • When we change our policies, we update them in public places and clearly note the revised date and the reason for changes.

Professionalism	We remember the importance of our jobs with respect to the public. We listen to our customers and treat them with dignity and respect.
	- We tell customers our name and what department we work in. - We are courteous and positive in all interactions. - When possible, we maintain eye contact and demonstrate active listening through our expressions and body language. - We wait until an individual has finished speaking, and then paraphrase what was said to ensure that we understand the request. - We follow up with customers to ensure their issues and problems are resolved and we provide periodic updates if a resolution takes longer than anticipated - We clearly explain what we do, how our programs work, and who to contact for further assistance. Our communications are clear, concise, and jargon-free. If a statute or rule is cited, it is explained clearly. - We resolve our every customer inquiry the first time we are contacted, if possible. - We answer calls or provide a voicemail service and call customers back in a timely manner. - We tell customers how to access emergency services during non-business hours. - We strive for continuous improvement.
Empathy	We can relate to all customers because as residents we are also customers of our local governments. We do our best to see the interaction from their perspective.
	- We listen actively, acknowledge the problem, and ask questions before providing an answer. - If we cannot provide what is asked, we offer suggestions and options. - Problems and complaints are resolved quickly with minimal effort on the customer's part. - We take responsibility. If things go wrong, customers are entitled to a good explanation and an apology. - We are kind and helpful even if we have to say "no." We provide an adequate explanation when we have to say "no."

Strategies for delivering excellent customer service:

This section lists the agreed upon strategies for delivering excellent customer service for the City by December 31, 2019. Each strategy has multiple corresponding actions. For each action, there is a deadline and a department responsible for ensuring that the action is completed.

1. Empower employees to meet customer needs

Action	Deadline	Implementation Responsibility
Develop a knowledge management solution for staff 1. Build up basic categories of knowledge all employees might need in Kana Knowledge Network. 2. Allow all employees access to view the Kana Knowledge Network. 3. Allow designated employees from each department to be editors in knowledge network to continue to update the content. 4. Create a simple guide on how to use the Kana Knowledge Network. 5. Ensure processes are in place to maintain & update the information.	January 1, 2019	Customer Care
Formalize a list of frequently asked questions to help staff in all departments provide easily retrievable answers to common customer questions and keep materials on hand, such as citizen guides, that can be provided to citizens upon request.	December 1, 2018	Customer Care
Facilitate cross-departmental networking between employees. 1. Conduct regular tours to different departments and facilities. 2. Create a training program where experienced employees train others on skills they have mastered. 3. Produce an employee profile web series highlighting different roles in the organization.	July 1, 2019	1. Tulsa Spirit 2. Human Resources 3. Communications
Identify key work processes in every department, create/update Standard Operating Guidelines for each key process, and make department SOGs accessible to all. **Key Processes** are the most important processes and are critical to achieving the departmental mission. Publish processes that impact internal and external customers.	March 1, 2019 July 1, 2019	Departments with technical support from OPSI & Innovation Champions

| Update the Employee Shout Outs page monthly to acknowledge employees who are nominated for awards or who get compliments for great service. | November 2018 | Human Resources & Communications |
| Provide regular Customer Service tips to all City departments and work groups so that they can routinely reinforce best practices in Customer Service. | October 2018 and ongoing | Peer Training Team |

Success metrics:

Employee survey responses:

- I have received the training needed to be an effective and efficient employee.
- I feel well-informed about what is going on in the City.
- There is good cooperation between the departments with whom I work.

# of key work process Standard Operating Guidelines posted

Average # of hours of Customer Service training per employee per year

2. **Build a customer-centered culture to make each experience as seamless as possible for customers**

Action	Deadline	Implementation Responsibility
Ensure Customer Service is included in the criteria used for the hiring selection process	January 1, 2019	All Departments
Incorporate Customer Service Principles into orientation	January 1, 2019	Human Resources & Peer Training Team
Create an Information Desk at public entrance to City Hall and staff with City Hall Docents	April 1, 2019	MORE & Communications
Develop systems to easily update customers on the progress or status of lengthy requests, inquiries or transactions. Close created work orders or cases only when the work is complete.	November 1, 2018 – No work order closed until work completed. October 1, 2019 – Key processes	All Departments
Develop linguistically accessible City documents	March 1, 2019	MORE & Communications
Incorporate Customer Service Principles and metrics into contracts for City vendors and partners	March 1, 2019	Finance – Purchasing Division

3. Empower Customers to Improve their Experiences

Action	Deadline	Implementation Responsibility
Increase opportunities and channels for customers to provide feedback: 1. Update the City website to add language that explains the overall process for handling complaints and provide contact information to follow up on a complaint. 2. Request survey responses upon closing of Customer Care tickets to obtain feedback on satisfaction with complaint/issue resolution. 3. Begin using standard surveys to obtain feedback from internal and external customers upon finalizing the use of a City service. 4. Implement a general citizen satisfaction survey every year.	December 31, 2018	1. Human Resources 2. Customer Care 3. All departments 4. Mayor's Office
Improve self-serve opportunities: 1. In accordance with Action 35 in the Resilient Tulsa strategy, pilot City-Hall-On the Go in three neighborhoods. 2. Evaluate potential usage of kiosks for customers to conduct key City business (e.g. pay utility bill, renew pet license, pay parking fine, etc.) at a single location.	December 31, 2019	1. MORE and Customer Care 2. Finance – Treasury Division
Improve City communications and engagement with all Tulsans: 1. Develop a City Hall Docent Program. 2. Develop a City Communications and Engagement Strategic Plan and Manual.	March 1, 2019	MORE and Communications

GUIDELINES FOR SURVEYING CUSTOMERS

City leaders are committed to pursuing continuous improvement for the organization. Best practices in customer service include capturing meaningful information from customers to determine satisfaction levels and, where possible, comparing satisfaction of customers to benchmark agencies providing the same or similar services. City departments provide over 100 different services and products to internal and external customers. Some services are provided to the public and the public is not charged for the service or product every time they use it (e.g. roads and bridges, use of parks, emergency response) while some services are available to the public at a cost when the service is received (e.g. water and sewer, refuse and recycling, performance tickets). The expectations of the users of these services can vary based upon a variety of factors including how frequently they use the service and whether they have options for other providers.

To deliver quality customer service, it is important to segment customers and better understand what is important to them. It is also important to compare satisfaction of customers to the satisfaction of customers at benchmark agencies that deliver the same or similar services. As part of the Customer Service Principles Strategies, **all departments are responsible for using surveys to gain customer feedback**. These guidelines are intended to help departments implement this action, receive meaningful feedback, and use that feedback to improve services and satisfaction of customers.

1. Identify **key processes** – Processes include the people, machines, tools, techniques, and materials in a defined set of steps or actions. Key processes are the most important or critical to achieving the department's or work group's intended outcome. A key process for a department should be tied to the department's mission. To identify key processes, ask the following questions:
   a. What is our mission?
   b. What services or products do we deliver as part of that mission?
   c. Who is involved in the service or product delivery?
   d. How do they deliver the service or product?

2. Identify **customers** of each key process. Customers are the actual or potential **users** of products, programs, and services. To identify customers, ask the following questions:
   a. What is the output of the process?
   b. What product or service are we providing?
   c. Who uses that product/service?
   d. Who might use that product/service in the future?

Examples of key processes and potential customers include:

Service/Product	Customer
Hiring process	Work group/hiring manager
Purchasing process	Group/individual requesting purchase. Individuals who will use what is purchased.
Traffic signals	Drivers, pedestrians, and cyclists on City streets
Small Area Plan	Engineers reading small area plan for infrastructure development Developer who might build in the area
Emergency response	Caller Person/group in need of emergency assistance

3. Identify a sampling procedure. Where possible, a census survey of the entire customer population is ideal. It will give the most complete view of how customers are engaging with a service or product. However, many services happen daily or weekly and have thousands of customers. To conduct a census survey in those instances would require significant resources. Therefore, a population survey is not feasible with every service. In instances with a population that's too large to conduct a census survey, there are different methods for selecting a sample of the population.

Sampling Method	Definition	Valuable when…	Constraints
Random	Creating a system to randomly select participants so that each member of the population has an equal chance of being selected to participate	Confidence that the sample adequately represents the whole is important	Requires a list of the entire population.
Stratified Random	Selecting a sample so that certain subgroups in the population are adequately represented. Randomly selecting participants within subgroups.	There are clear segments in the customer base who have different types of needs or expectations.	Requires a list of the entire population. Members of the population must be classified into segments.
Systematic	Starting with a randomly selected number and then selecting every fixed number of individuals after that.	There is a need simplicity in the sample approach.	If based upon a list with the population, the list should be randomly ordered.
Convenience	Selecting a group of individuals that are easily accessible.	Conducting the other types of sampling is burdensome or would cost too much.	Less cofidence that the sample represents the whole.

4. Select an appropriate survey tool. Depending upon who customers are and how they interact with employees and services, different survey tools can be ideal. Examples of survey tools:
   a. Email - Staff can send out emails with links to surveys to complete online. Some common online survey tools are:
      i. SurveyMonkey
      ii. [Feedback Tulsa](). This is an online feedback tool that is accessible to all City departments.
   b. In person - Staff can provide paper surveys to be completed and turned in at physical locations. Paper surveys can also include a web address to fill out electronic surveys.
   c. Phone - Staff can call after a service is complete to ask about satisfaction with the service.

5. Identify **when** to survey customers. The purpose of surveying customers is to confirm that services are meeting customer needs. If customer needs are met, services are working. If customer needs are not met, it is important to learn that as quickly as possible, so that services can improve and problems can be minimized for future customers. The best time to conduct a survey is when the experience is fresh in a customer's mind. When possible, it is ideal to include a survey in any email that notifies a customer their order or ticket has been completed. Surveying customers right after an interaction gives them an outlet to express dissatisfaction and gives a team an opportunity to correct quickly. If is it not feasible to conduct a survey within two to three days of service completion it is important to establish a reasonably reliable timeframe for conducting surveys. It is also important to establish a process so that surveys can be conducted systematically as part of the overall workflow.

6. Ask **standard questions** of all City customers. The City's Customer Service Principles are based upon an understanding of the key drivers to customer engagement. To measure satisfaction and adherence to these principles, surveys should use the following standard questions and options for answers:

   Please indicate to what extent you agree or disagree with each statement about our services.

   Answer choices
   Strongly Disagree – 1; Disagree – 2; Agree – 3; Strongly Agree – 4; Not applicable – NA

   1. My overall experience with this service was positive
   2. Employees demonstrated knowledge and expertise in this service
   3. Business hours and location were convenient
   4. Facilities were safe and clean
   5. Services were provided in a timely manner
   6. Staff was fair in their exercise of judgment and application of policies and procedures

      7. Staff maintained positive interactions
      8. Staff communicated clearly
      9. Customers were given adequate individual attention by staff
      10. It felt easy to get information about policies and procedures for this service

7. Ask any **additional** detailed questions that will help improve services. The standard questions are designed to measure how City customers perceive how well City employees are exhibiting the established customer service principles. If there are extra questions that will help improve services include those in the same survey. Be sure to only ask questions that will be used to improve services. Customers are usually happy to provide feedback but will want to feel like their input is being acted upon.

8. Set **targets** for levels of satisfaction. Remember that the goal is to deliver quality customer service. A first survey is necessary to establish a baseline or starting point for satisfaction levels. From a baseline, teams should establish targets for improvement over the baseline. Benchmarking results from other cities or organizations that provide similar services can help identify realistic targets. Once targets are established they should be shared with all team members who are responsible for helping achieve the targets.

9. **Share results** of surveys with employees who are part of the process. A report of results should include who was surveyed, what service they were surveyed about and how many participated in the survey.

10. Develop **action plans** for improving under-performing areas (when satisfaction levels aren't meeting established targets). Surveys should help find areas for improvement in service delivery. If all areas are above targets, a plan might be needed to help sustain high levels of satisfaction. If all areas are not meeting targets, a clear plan for improving results should be developed and started with team members.