



**SBS**Stat

# Customer Service

Q2 | July 28, 2020

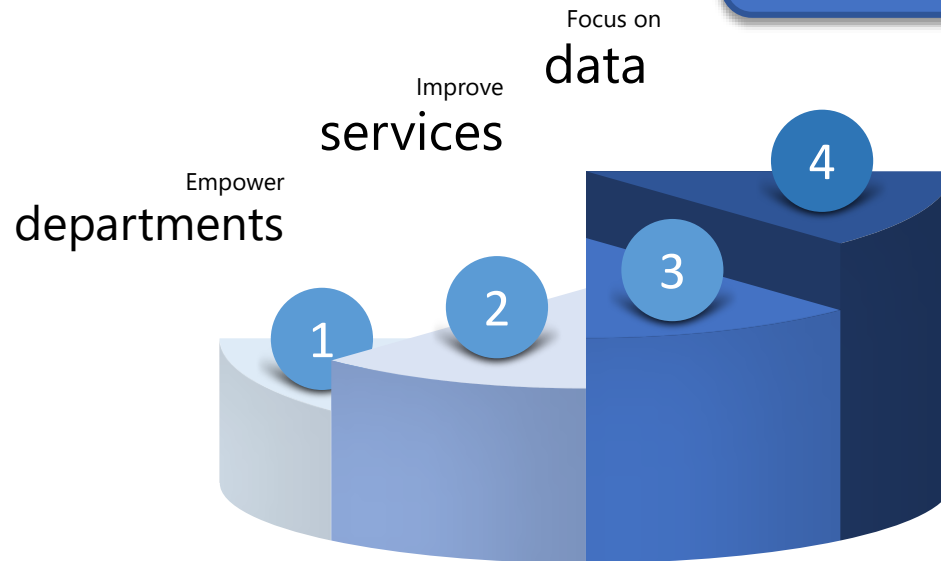
# Guidance for a Remote SB Stat Meeting

1. When you're not speaking, please mute your microphone
2. To ask a question, let the facilitator know you have a question in the chat. This can be as simple as typing:
  - "Hi I have a question"
  - "I'd like to follow up on this"
3. The facilitator will let the conversation breathe during discussion, but will step in if needed

Why we're here

# Citywide Performance Management

These are the SB Stat Program Goals in 2020. These goals serve as a roadmap for departments and guidance from the Mayor on priority areas of focus in 2020



# Today's Agenda

I. Goals for today and a quick survey

II. Using data to drive performance

III. Taking action

IV. Celebrating our values

# Goals for today and a quick survey

# Goals for Today

1. Build shared understanding of our goals for customer service provided by the City
2. Share data and provide updates on strategic initiatives related to customer service
3. Collect feedback on prospective Stat projects, customer service KPIs, and next steps for Customer Service Stat

# Drucker Playbook

*"Our business is not to casually please everyone, but to deeply please our target customer."*

– Philip Kotler, Northwestern University

- Who is our customer?
- Who is the primary customer we're targeting?
- What does the customer value?



# Using data to drive performance

Diving deep into a few key initiatives being undertaken to improve city performance

- 311 Data Overview and Dashboard Prototype
- Utility Data Overview and Dashboard Prototype



# Customer Service Stat

## 2020 Work Plan

### January 2020 Memo to Department Heads

SB Stat 2020 Roadmap January 31, 2020

This document is a roadmap for the SB Stat program and shares guidance from the Mayor on priority areas of focus in 2020, preliminary topics of interest, and a high-level calendar for the year. The goal of the SB Stat Program is the following:

- Empower departments to assist in the strategy, design, implementation, and evaluation of municipal services
- Improve service delivery by identifying, discussing, and taking action to mitigate potential problems
- Focus on data that matters to improving the lives of residents of South Bend

**SB Stat Program Summary & Changes in 2020**

1. Police and Fire will both remain distinct priority areas in the SB Stat program.
2. Neighborhoods will continue to be a part of the SB Stat Program. This priority area will require support from leadership in Public Works, Community Investment, Code Enforcement, among others.
3. Venues, Parks, & Arts will continue to be part of the SB Stat Program. However, it will have a stat meeting during the first and third quarter of the fiscal year.
4. A new priority area focused on Customer Service will become a part of the SB Stat Program. Customer Service Stat will mainly comprise of functions from 311 Services and Utilities. However, it will have a stat meeting during the second and fourth quarter of the fiscal year.

**2020 SB Stat Priority Areas**

Below are the five priority areas in the 2020 SB Stat program. These priority areas are ranked in terms of cost impact to the City's overall budget. Under each priority area is a preliminary list of topics to be discussed over the course of the year.

**1** **Police**

Class Prevention  
Trust, Accountability  
Recruitment

**2** **Fire**

Career Progression  
Eag Cost Recovery  
Strategic Planning

**3** **Neighborhoods**

Infrastructure, Resource  
Coordination, Strategic  
Initiation

**4** **Venues, Parks, & Arts**

Economic Impact, User  
Experience, Youth  
Engagement

**5** **Customer Service**

Baseline Data, Trends,  
Variable Rates

Customer Service Stat	311 Call Center Utilities	Innovation & Technology, Legal Operations Departments: 311 Call Center, Utilities
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# Customer Service Stat Portfolio Summary

Status of SBStat projects in the queue for 2020

Project	Status
311 Baseline Data and Trends	●
Utility Baseline Data and Trends	●
Variable Message Rates	●
311 Service Portal	●

Legend



Project on schedule



Project delayed



Project cancelled



Project under consideration

# Customer Service 311 Call Center

- Division Overview
- Available data and Benchmarks
- Dashboard Prototype



# 311-at-a-glance

*A general overview of the 311 call center*

Mission Statement	<ul style="list-style-type: none"><li>• South Bend 311 is here to answer your questions about City of South Bend services.</li></ul>
Guiding and Governing Documents	<ul style="list-style-type: none"><li>• Service Level Agreements between 311 and departments (SLAs)</li></ul>
Staff Overview	<ul style="list-style-type: none"><li>• ~ 8 employees (full-time and part-time)</li></ul>

# 311 Data

*A breakdown of available data collected and maintained by the 311 call center*

## 01

CRM data

- + *Tracks calls, service requests, and KBA interactions*
- + *Provides deeper level metrics on customers, such as repeat callers, call resolution, and call notes*

## 02

Cisco data

- + *Call time data, including calls handled, average call length, abandoned calls, average hold length, etc.*
- + *Ability to review these metrics by 311 call operator*

## 03

Service Level Agreements (SLAs)

- + *Target number of hours for a service request to be resolved. Broken down by service and department*

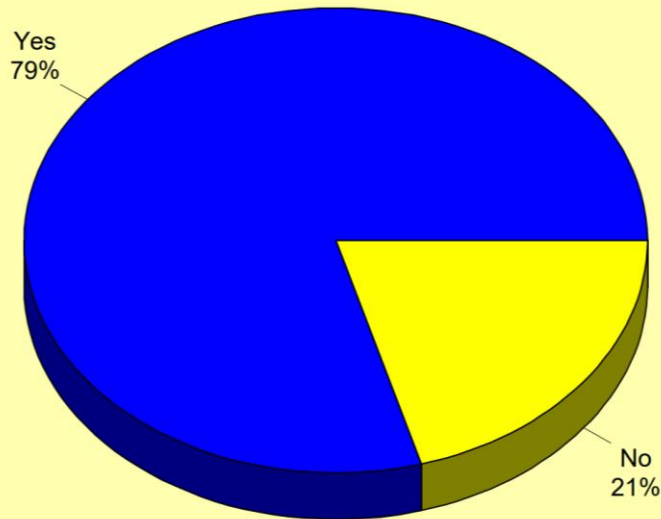
# Available Data

## Community Survey Results

- Data below is from 2018. 2020 results will be available by next Stat meeting.

### Q12b. Did you contact 311?

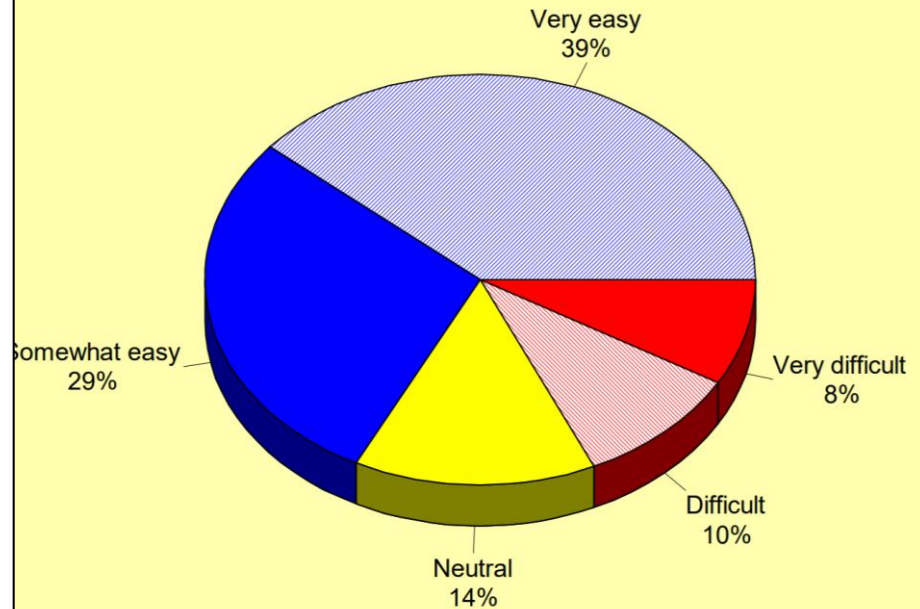
by percentage of respondents who have contacted the city within the past year



Source: ETC Institute (2018)

### Q12c. How easy was it to address your issue?

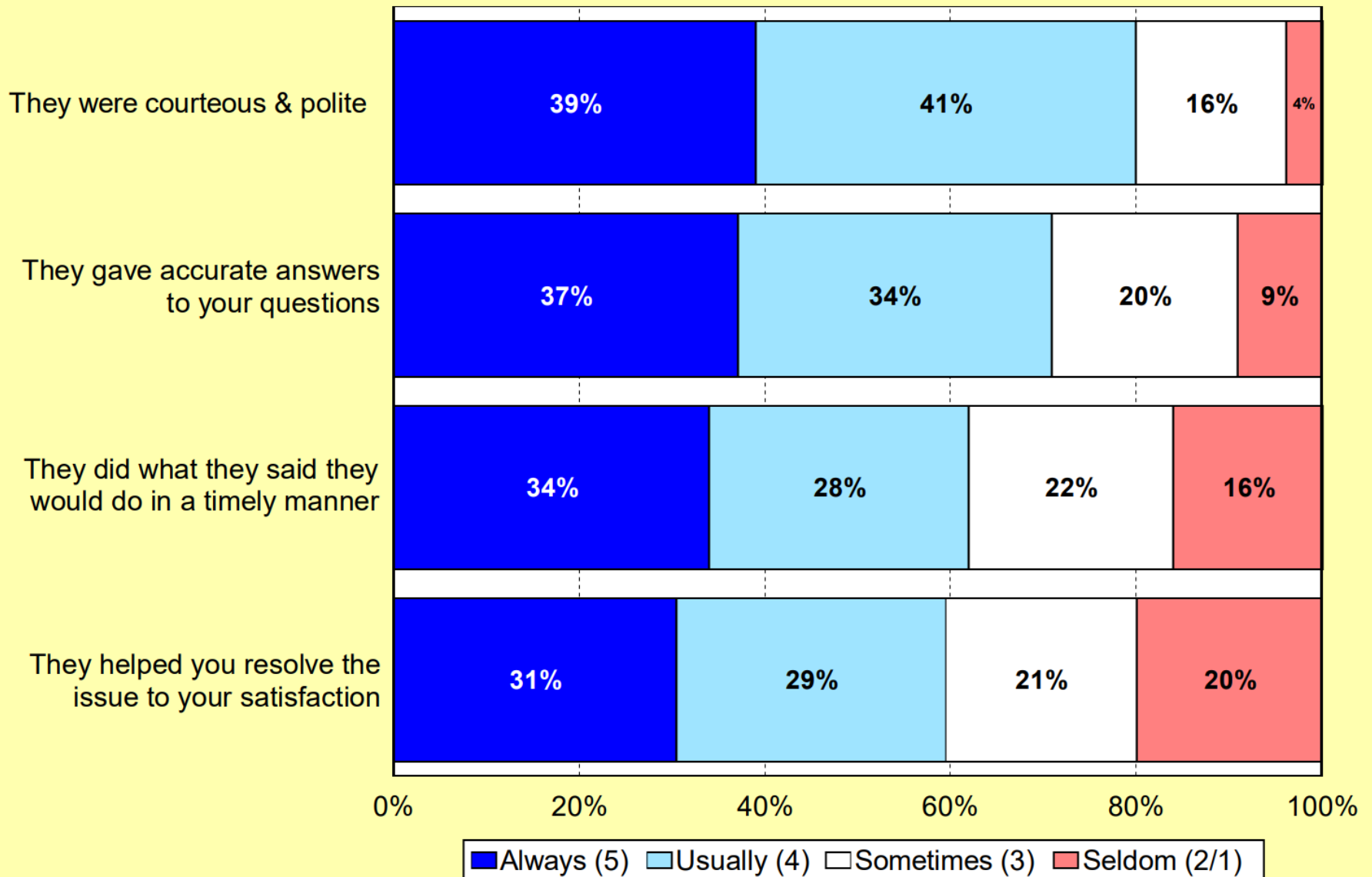
by percentage of respondents who have contacted the city within the past year



Source: ETC Institute (2018)

# Q12e. Rating of City Customer Service Employees

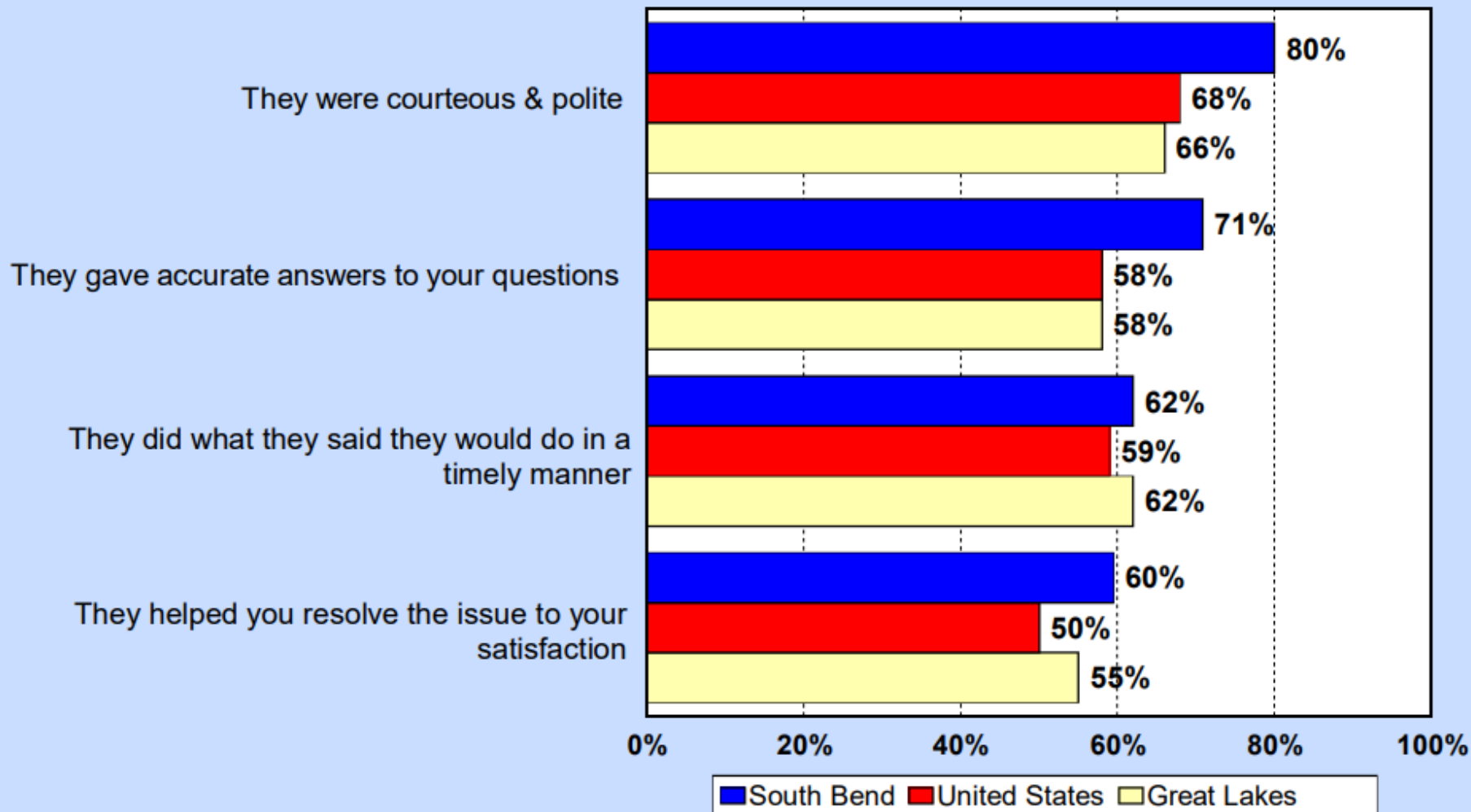
by percentage of respondents who contacted the city within the past year  
rated the item as a 1 to 5 on a 5-point scale (excluding never)



# Factors that Influence Perception of Quality Customer Service Received from City Employees

## South Bend vs. United States vs. the Great Lakes

by percentage of respondents who gave positive ratings for the item (excluding don't knows)





# Benchmarking

*Data and resources available*

## Fort Wayne, IN, ranked second in call center benchmarking study

### CITY 311 RANKS 2ND AMONG TOP 100 SMALL CALL CENTERS

#### City of Fort Wayne call center a leader in U.S. and Canada

Fort Wayne, Ind. – The City of Fort Wayne's 311 Call Center has earned 2nd place in a ranking of Top 100 small call centers in the United States and Canada, according to BenchmarkPortal.

This marks the second consecutive year that Fort Wayne's call center has ranked in the Top 100 Small Call Center category, which includes private and municipal centers staffed by less than 100 employees.

"Our 311 Call Center is all about serving the public better and making City government more efficient, accessible and responsive," Mayor Tom Henry said. "Our 311 staff is committed to providing the friendly, professional, helpful service that our residents expect when contacting their City government."

Led by Julie Sanchez, director of Citizens Services, 311 includes a staff of eight full-time employees, who take calls and emails from 7:30 a.m. to 5:30 p.m. 311 serves as the main service center for answering general information questions about city programs, policies, activities and attractions. 311 call takers also receive and record phone or online requests from citizens and ensure that they are addressed or referred to the appropriate department for resolution. In 2012, the call center handled about 170,000 calls.

"We are working hard to become a community resource," said Sanchez, noting that 311 has succeeded in providing quicker turnaround times and shorter wait times and has incorporated a performance-based model to better serve the public. "We strive to be a place where residents can get information and assistance, provide feedback and share thoughts and ideas about city services."

The 2nd place ranking was awarded by BenchmarkPortal, an international organization recognized as a leader in call center expertise, certification and training, research and tracking of the industry's best practices.

"The City of Fort Wayne's 311 Call Center is among the best in its industry," said Bruce Belfiore, CEO of BenchmarkPortal. "This award was granted on the basis of objective, metrics-driven performance. Fort Wayne stood tall against its competitors according to the world's largest database of call center metrics – this is not easy to do, and we congratulate them on their accomplishment."

Benchmark ranked call centers based on surveys distributed to its database of more than 1,000 public and private call centers in North America.

The City launched its 311 program in 2007 to make government more accessible. Since then, services provided by 311 have continued to expand; the department currently assists 22 City departments.

The 311 service is part of an ongoing effort to make City government easier to access and more responsive to the needs of citizens, businesses and visitors. Through Citizen Services, the City engages with the public to make improvements, measures departmental service performance, and through the use of innovation, collects community voice, which empowers citizens to help drive change.

Last month, 311 received a 2012 KANA Highly-Commended Customer Award for Best Citizen Experience from KANA Software.

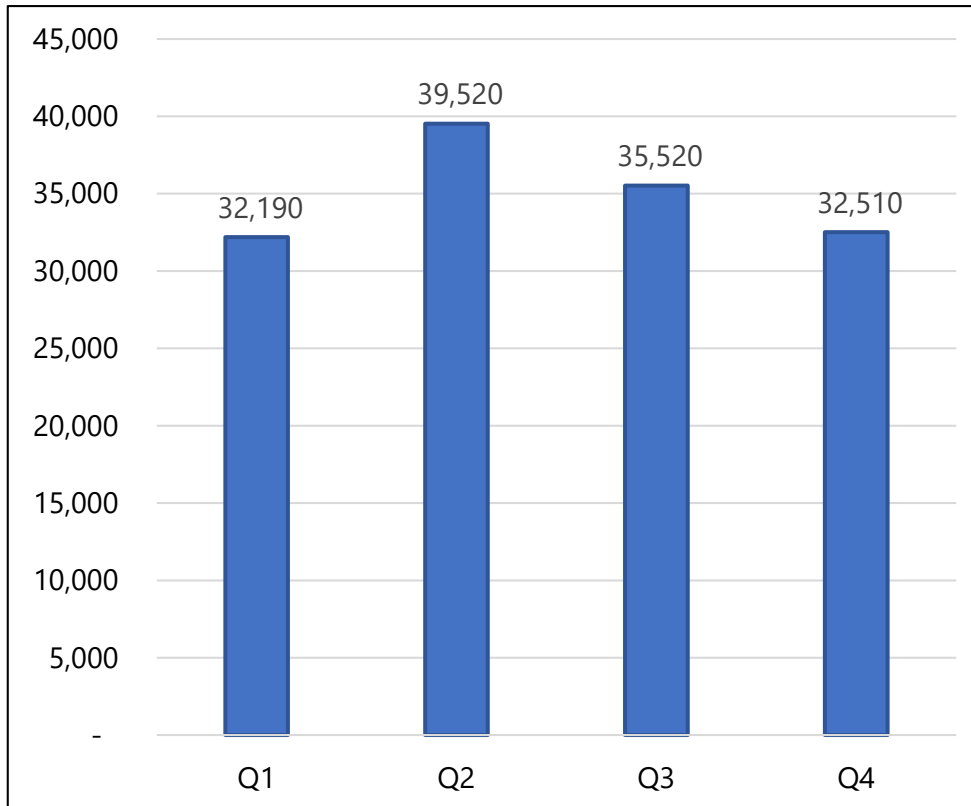
## Key Performance Indicators from other Cities

- Average Annual Calls Per 100 Residents
- Average Annual Call Handling Time (seconds)
- Average Percent of Calls Transferred to Another Department
- Percent of all calls abandoned by the caller
- Percent of customers surveyed satisfied with the service

# 2019 Data Review

## Available Data (CRM)

Call Volume by Quarter



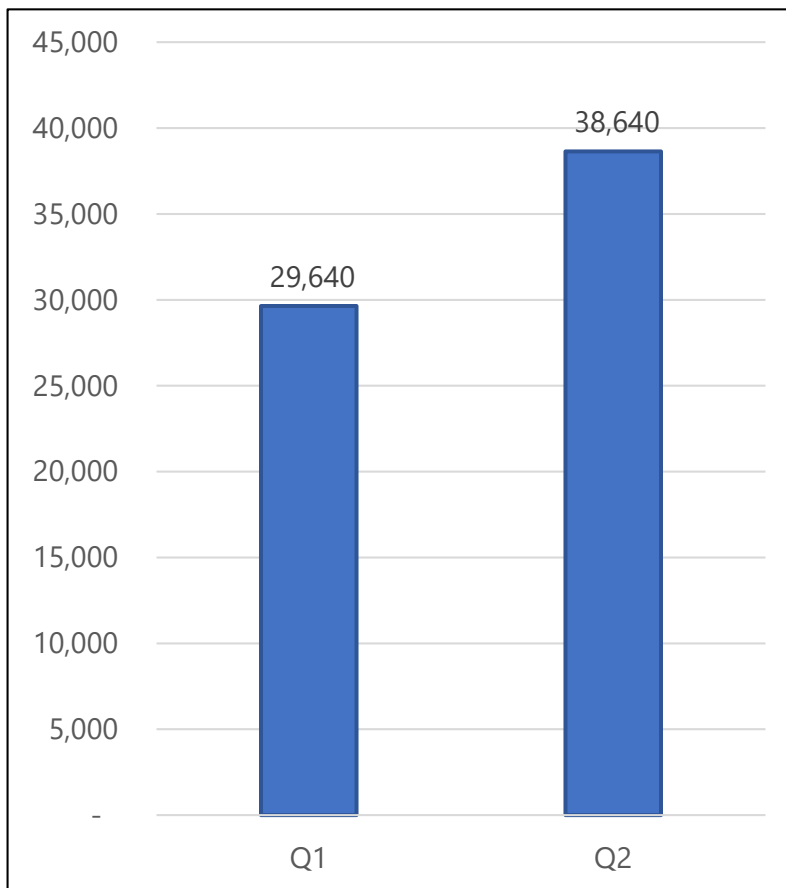
### Top 5 Call Topics

(with trash pick up and utilities bill removed)

1. Request an Extra Trash Pick-up / Report Missed Trash Pick-up
2. Start of Balance Forwarding Deadline
3. Account Balance & Account Care
4. Request a Yard Waste Extra Pick-up
5. Starting or Transferring Utility Service

# 2020 Year-to-Date Available Data (CRM)

## Call Volume by Quarter



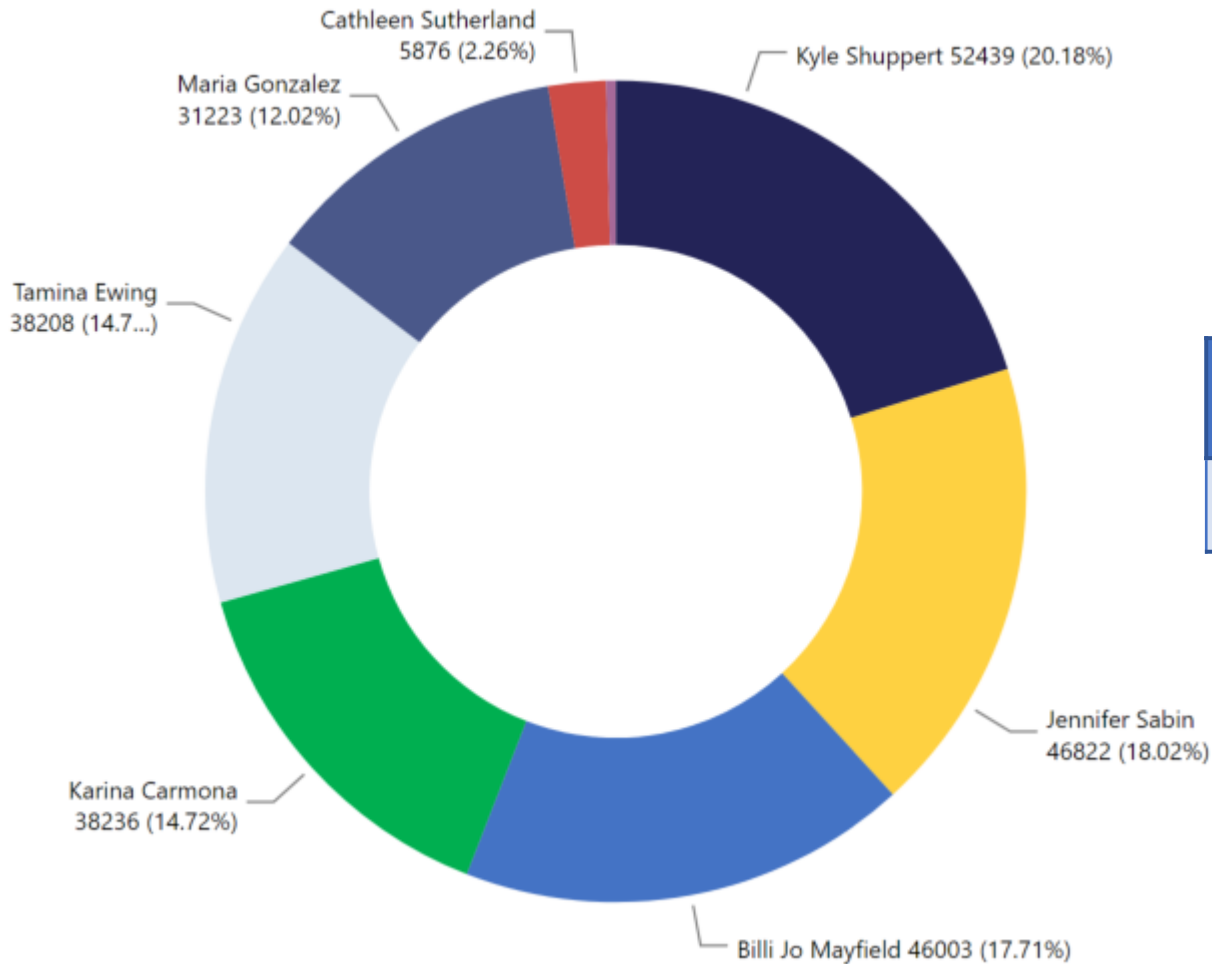
### Top 5 Call Topics

(with trash pick up and utilities bill removed)

1. Request an Extra Trash Pick-up / Report Missed Yard Waste Pick-up Request
2. Starting or Transferring Utility Service
3. Shut-Off Balance and Payment Deadline
4. Missed Yard Waste Pick-up Request
5. Organic Resources

# Workload for Call Center Operators

## Available Data (CRM)



Average number of calls by each operator taken per day

99 - 103

# KPI Summary and Key Takeaways

*Breaking down 2019 and 2020 CRM data*

Best Practice KPI	2019	2020 Projected	Difference
1. Average Annual Calls Per 100 Residents	797	768	(29)
2. Median Annual Call Handling Time (minutes)	2	2	0
3. Average Percent of Calls Transferred to Another Department	1.9%	1.5%	(.4%)

## *Key Takeaways*

1. 2020 is projected to be a similar year in terms of workload as 2019, despite COVID-19
2. Customer service provided by the City is rated more positively than national and regional benchmarks

# Available Data

## 311 Dashboard Refresh - Prototype

# Discussion Questions

*Feedback and reactions to dashboard prototype*

- What do you like about the dashboard prototype? What do you not like?
- What data would you like to learn more about?

*Water Tower, South Bend, Ind.*

## Customer Service Utilities

- Division Overview
- Available data and Benchmarks
- Dashboard Prototype



# Utilities-at-a-glance

*A general overview of the utilities division*

Mission Statement	<ul style="list-style-type: none"><li>• We sustain wellbeing through essential water services</li></ul>
Guiding and Governing Documents	<ul style="list-style-type: none"><li>• <a href="#"><u>South Bend Municipal Utilities' Rules and Regulations</u></a></li></ul>
Staff Overview	<ul style="list-style-type: none"><li>• ~ 117 employees (full-time only)</li></ul>
Programs and services	<ul style="list-style-type: none"><li>• Water</li><li>• Wastewater</li><li>• Organic Resources</li></ul>

# Utilities Data

*A breakdown of available data collected and maintained by the utilities division*

## 01

CRM data

- + *Data related to calls into 311*
- + *Common requests include: "How much is my utility bill?"*

## 02

Naviline data

- + *Financial data, including transaction level data, individual accounts, etc.*
- + *Some ability to review payment data over time, late payments*

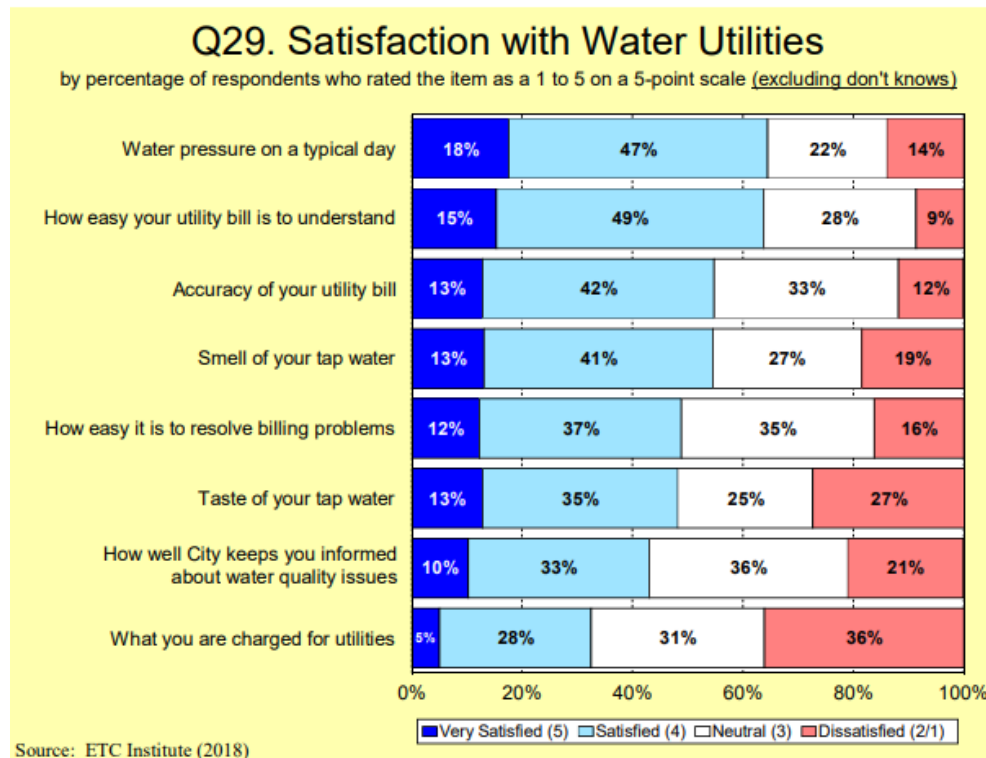
## 03

Internal spreadsheets and tracking tools

- + *Use to track basic activities conducted by staff and services requests*
- + *Includes data related to water main breaks, water line breaks, etc.*

# Available Data

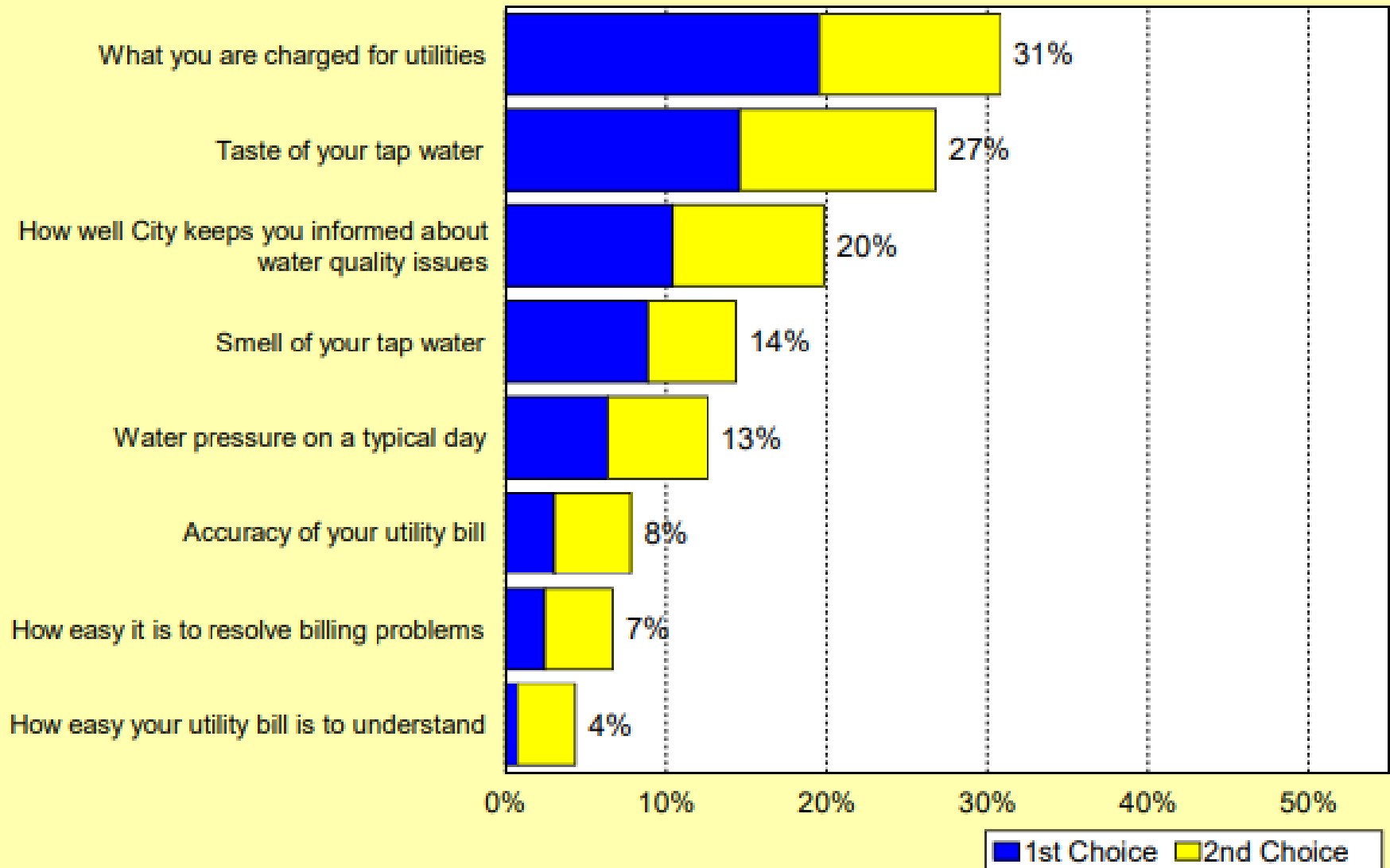
## Community Survey Results



- Data to the left is from 2018.
- 2020 results will be available by next Stat meeting.

# Q30. Water Utility Items That Should Receive the Most Emphasis Over the Next Two Years

by percentage of respondents who selected the item as one of their top two choices



# Benchmarking

## *Data and resources available*

- Benchmarking Project provided by American Water Works Association (AWWA)
- Customer service benchmarks include:
  - Service Complaints
  - Call Center Indicators
    - Average Talk Time (minutes)
    - Average Wait Time (minutes)
    - Abandoned Calls (%)
    - Average Calls per Call Center Representative
    - First Call resolution
  - Water Service Affordability
    - Residential Cost of Water Service (\$/month)
  - Delinquency Rate
    - Wastewater Service Disruptions
    - Disruptions of Wastewater Service (outages/1,000 accounts)
    - Average Time to Address Wastewater Service Disruptions (hr) o Disruption Frequency of Wastewater Service

# AWWA Case Studies

## *Consultant-level support*

Water and Sewer Authority (DCWASA) was established as an independent authority of the District of Columbia to ensure the separate legal existence. In 2010 the name was changed to DC Water. DC Water provides more than 7.8 million annual visitors in the District of Columbia and wastewater (sewer) service. With a service area of approximately 725 square miles, DC Water also treats wastewater for other jurisdictions, including Montgomery and Loudoun counties in Virginia and Loudoun and Fairfax counties in Virginia.



DC Water's Strategic Plan, adopted in March 2013, outlines a vision to be achieved by following a course of disciplined decisions and actions to achieve the goals of the plan, including a culture of performance.

DC Water is implementing an enterprise program, as part of its international performance improvement program, to accomplish its goals. Benchmarking studies help compare performance to peer utilities. Benchmarking serves as a tool for DC Water in a number of ways in the

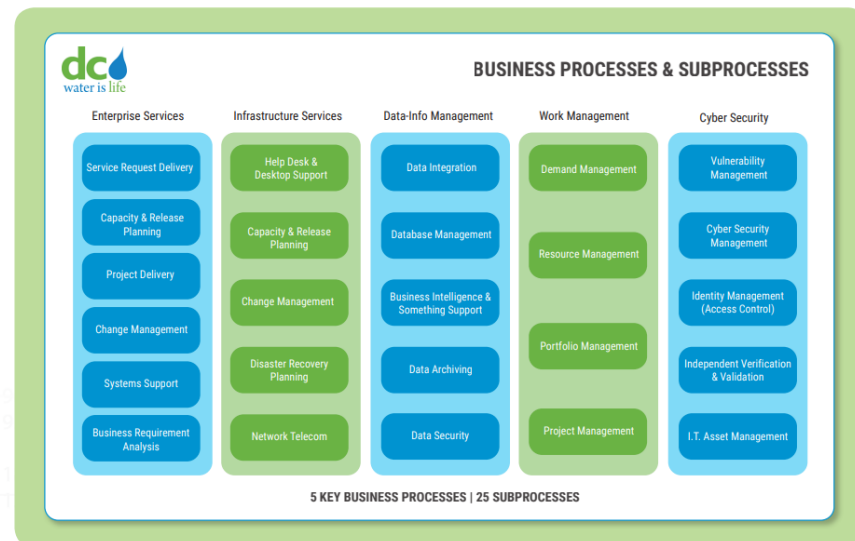
**“Our utility has benefited from AWWA Benchmarking by enabling comparison to peer utilities, providing a tool for evaluating utility performance year to year, informing selection of internal strategic outcome metrics, and highlighting the importance of monitoring performance.”**

Sarah Neiderer, Strategic Planning Officer

DC Water participates in the AWWA Utility Benchmarking Survey, which serves as a vital tool for understanding utility performance and provides a foundation for understanding trends in performance year to year. Each year, DC Water staff participate in the survey representing departments across the enterprise. The survey highlights the importance of tracking, monitoring, and reporting on quantitative metrics within DC Water to better understand performance.

In 2016, DC Water developed strategic outcome metrics to align with the strategies in Blue Horizon 2020. The AWWA Benchmarking Survey metrics served as a vital resource in the selection of these metrics. DC Water reviewed the AWWA metrics and selected a combination of indicators that represented a holistic perspective of enterprise performance. By aligning DC Water's strategic outcome metrics with the AWWA metrics, DC Water can more routinely monitor performance beyond the annual Benchmarking Survey.

Moving forward, DC Water will evaluate annual benchmarking data and strategic outcome metrics to track trends in performance. Both will serve as tools for determining areas of improvement and areas of excellence.



# Available Data

## Utilities Dashboard Prototype

# Discussion Questions

*Feedback and reactions to dashboard prototype*

- What do you like about the dashboard prototype? What do you not like?
- What data would you like to learn more about?



# Project Updates & Taking action

Offering policy alternatives, data-based frameworks, and decision points to take action in improving the lives of South Bend residents

# Project Update 1

## *311 Service Portal*

- Current timeline
  - Scheduled for launch in October 2020
- Initial Services included in roll out
  - Solid Waste
- Project Manager: Anna Kennedy



# Project Update 2: Unpaid Utility Bills and COVID-19 Response

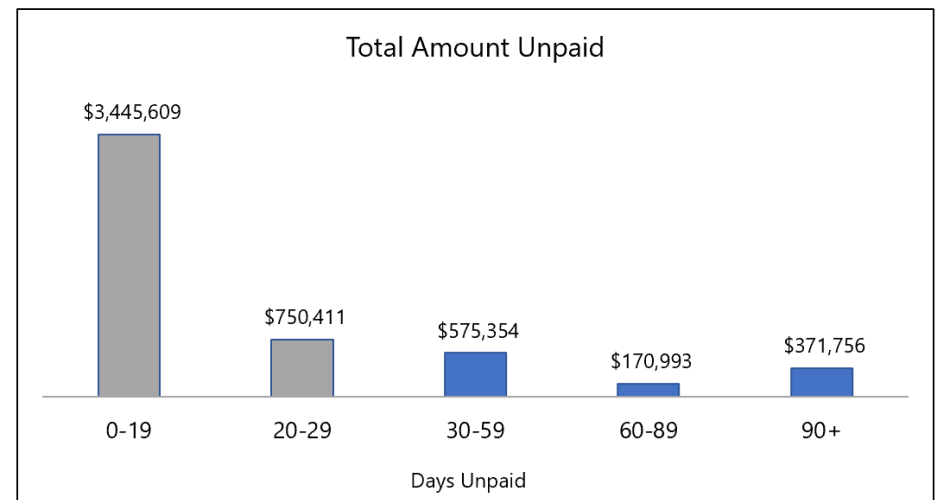
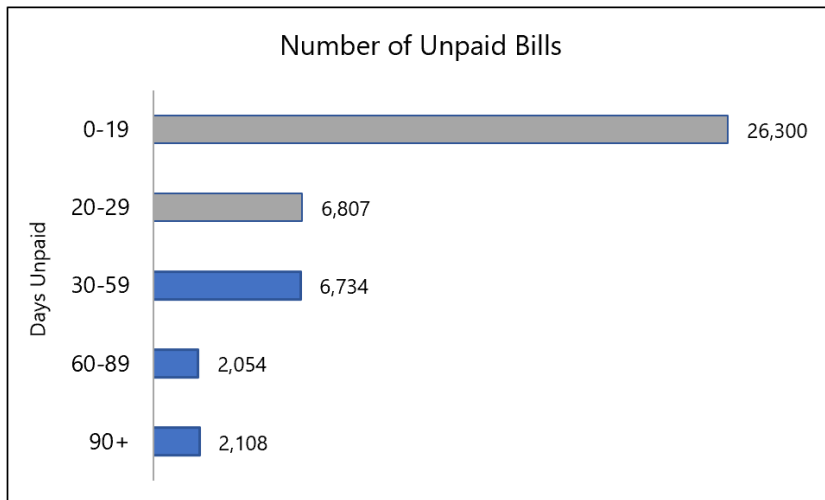
*An analysis and overview of available utility data related to delinquent bills*

## Summary Breakdown

Number of days bill has been unpaid	Number of Unpaid Bills	Total Amount Unpaid
0-19	26,300	\$ 3,445,609
20-29	6,807	\$ 750,411
30-59	6,734	\$ 575,354
60-89	2,054	\$ 170,993
90+	2,108	\$ 371,756
<b>Total</b>	<b>44,003</b>	<b>\$ 5,314,124</b>

Number of Delinquent Bills	Amount Unpaid
10,896	\$ 1,118,104

## Summary Graphs



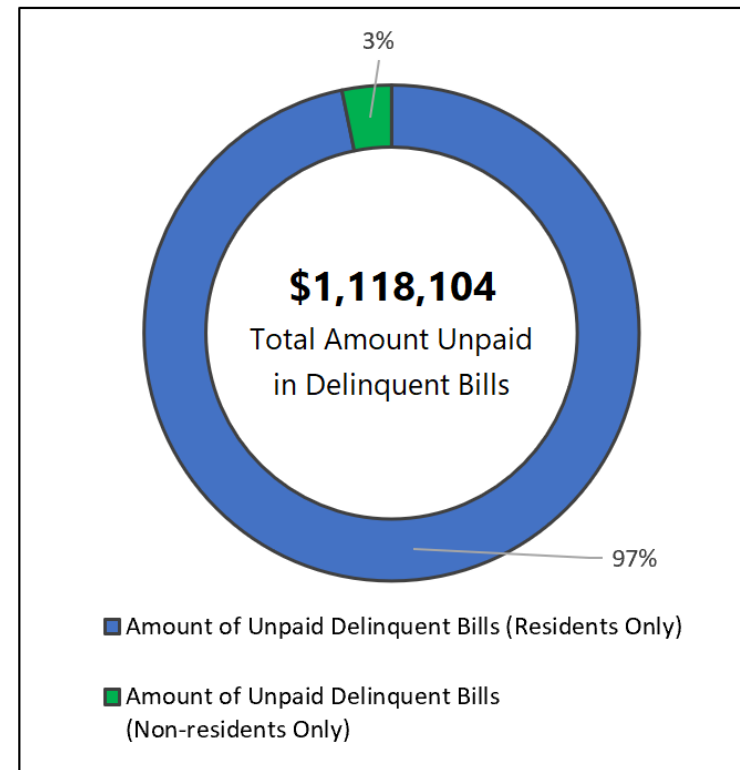
# Unpaid Utility Bills and COVID-19 Response

*An analysis and overview of available utility data related to delinquent bills*

## Residents vs. Non-Residents

Number of days bill has been unpaid	Amount Unpaid (Residents Only)	Amount Unpaid (Non-residents Only)
0-19	2,845,097	\$ 600,512
20-29	690,279	\$ 60,132
30-59	556,619	\$ 18,735
60-89	164,203	\$ 6,790
90+	361,279	\$ 10,478
<b>Total</b>	<b>4,617,477</b>	<b>\$ 696,647</b>

Amount of Unpaid Delinquent Bills (Residents Only)	Amount of Unpaid Delinquent Bills (Non-residents Only)
1,082,101	\$ 36,003



# Taking Action

*Coordinating unpaid bills, water shutoffs, and the City's overall COVID-19 response*

Available data	<ul style="list-style-type: none"><li>• Current unpaid bills, segmented by different criteria</li><li>• Economic indicators for customers with unpaid bills</li></ul>
Key context	<ul style="list-style-type: none"><li>• Moratorium on utility disconnection has been extended through August 14, 2020 by the State</li><li>• It is uncertain as to whether this moratorium will be extended</li></ul>
Decision points for the Mayor	<ul style="list-style-type: none"><li>• Do we forgive or delay unpaid bill payments for utilities?</li><li>• How do we address residents' questions on bill payments?</li></ul>

# Closing out the quarter

## Customer Service Stat Portfolio

Project	Status
Baseline Data and Trends	●
Variable Message Rates	●
311 Service Portal	●
Customer Service Best Practices for City employees	●
Predictive analysis for water main breaks and service leaks	●

### Questions to close out the quarter

- Do we have clear next steps for the key initiatives discussed today?
- Is the portfolio to the left still accurate? Should the projects next up in the queue be prioritized for next quarter?
- Are there any initiatives/areas of interest that should be added to the portfolio for next quarter?

#### Legend



Project on schedule



Project delayed



Project cancelled



Project under consideration

# Celebrating our values

This section highlights exemplary work happening in the City to improve performance that may otherwise go unnoticed

# Celebrating Our Values

- Reached 1 million contacts to the call center in 2020.
- Billi Viganski and Tamina Ewing had a wrap up time of less than 5 seconds between calls for 3 weeks straight.
- Kyle Shuppert continues to be the City's top call taker.

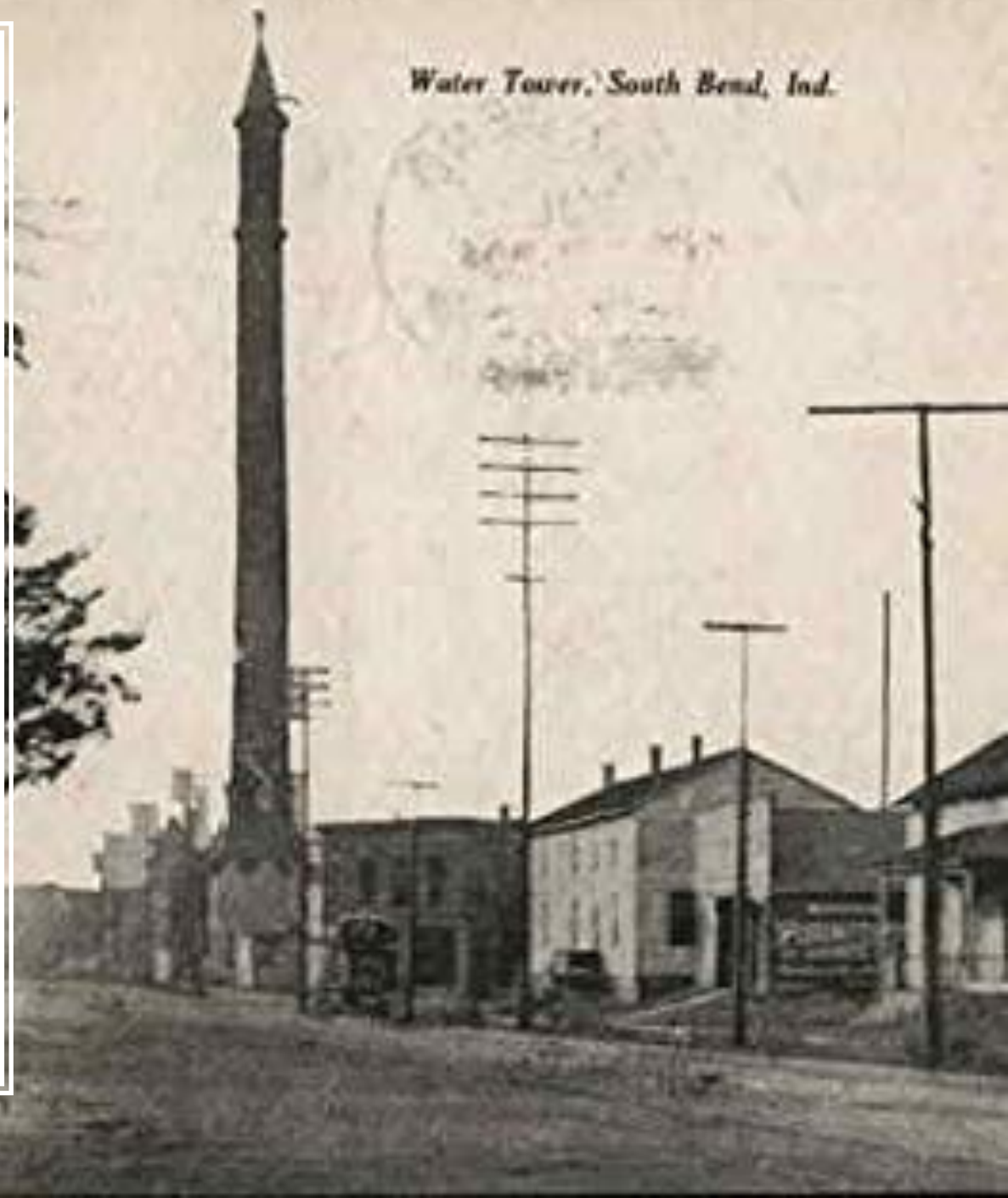




# Celebrating Our Values

- Continued to work during COVID-19 pandemic
- No noticeable disruptions to operations

*Water Tower, South Bend, Ind.*





**SBS**Stat

# Customer Service

Q2 | July 28, 2020