



SBStat | Customer Service

2021 Quarter 2 July 20, 2021
City of South Bend



Ground rules for SB Stat Meetings

1. No stupid questions

Use this space to ask and address difficult questions safely

2. Data-driven decision making

Strive to make decisions based on whatever most recent data is available

3. Relentless follow-up

Identify clear action items and owners after each meeting

4. A bias towards action

Continuously seek to improve: our data, our ways of working, etc.

Good questions to be asking...

- What are the next steps on this project? Who's going to own it?
- Do we have the data we need to make a good decision? If not, how can we get that data?
- Is there a strategy or hypothesis on this issue we want to test during the next quarter?

Today's Agenda

I. Project updates from previous Stat meeting

II. Data overview from past quarter

III. Deep-dive analysis & discussion

- Customer Service Audit
- Utility Data Update

IV. Taking action

- Identifying clear action items and owners

V. Celebrating our values

Hallmarks of great customer journeys








McKinsey&Company | Source: McKinsey analysis

Highlights from this past quarter

Project updates from previous Stat meetings

Customer Service Portfolio Summary

Status of SBStat projects in the queue for 2021

Project	Brief Description	Status
Bloomberg Innovation Support - Economic Relief from Utility Bills	South Bend was selected to participate in a national city cohort where cities are tackling timely challenges, utilizing best practices from other cities, Bloomberg, and its partners.	
Service Level Agreements Revamp	A Service Level Agreement is a contract between a service provider (311) and its customers (departments) establishing the expected amount of time it will take to deliver a service	
Universal Application for Financial Assistance	Creating a streamlined application to make it easier for residents to apply for multiple social assistance programs	
Online Service Portal Strategic Communications	Developing evergreen digital content to promote online service portal usage	
Customer Service Audit	Auditing the accessibility of customer service interactions residents have with the City	

Legend



Project on schedule



Project delayed



Project cancelled



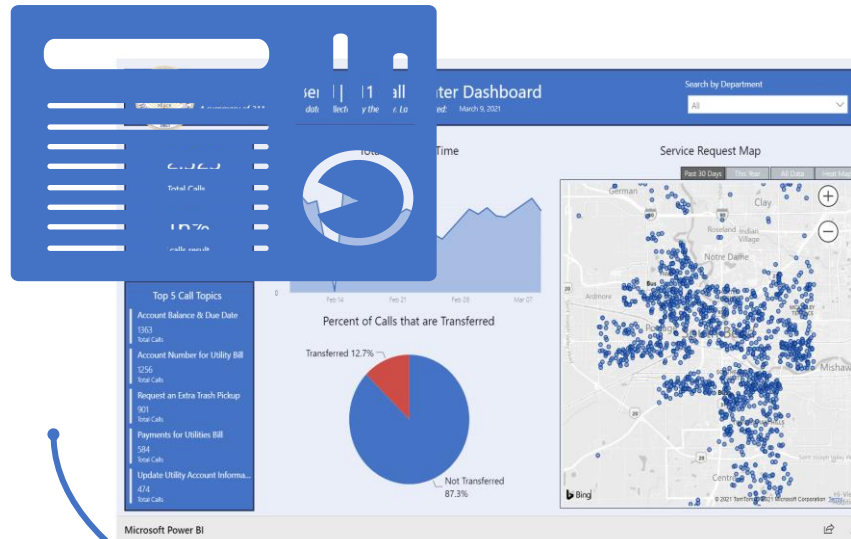
Project under consideration

Project Update 1 - Service Level Agreement Revamp

- 311 will be taking the lead with smaller departments / teams.
 - Deliverables from these meetings will be (1) a signed MOU between 311 and the department, (2) up-to-date KBAs, and (3) up-to-date SLAs.
- 311 and BA teams will meet with larger departments / teams.
 - Deliverables from these meetings will be (1) a signed MOU between 311 and the department, (2) up-to-date KBAs, and (3) up-to-date SLAs.



Connecting Customer Service to City-wide Performance Management Framework



- Current quarterly statistics
 - Total calls by department
 - Service requests by department



311 MOUs with
Departments



Database (CRM)



Residents submitting
service requests (Online or
via 311)

Project Update 2 - Bloomberg Innovation Training



- Universal application for assistance
 - Addressing the problem that it can be difficult for residents to apply to many programs
- Engagement Incentives for Hard-to-Reach Voices
 - Addressing the problem getting feedback from vulnerable/busy groups, addressing the problem of high utility bills and assistance uptake

Project Update 3: Universal Application

Examined four programs:

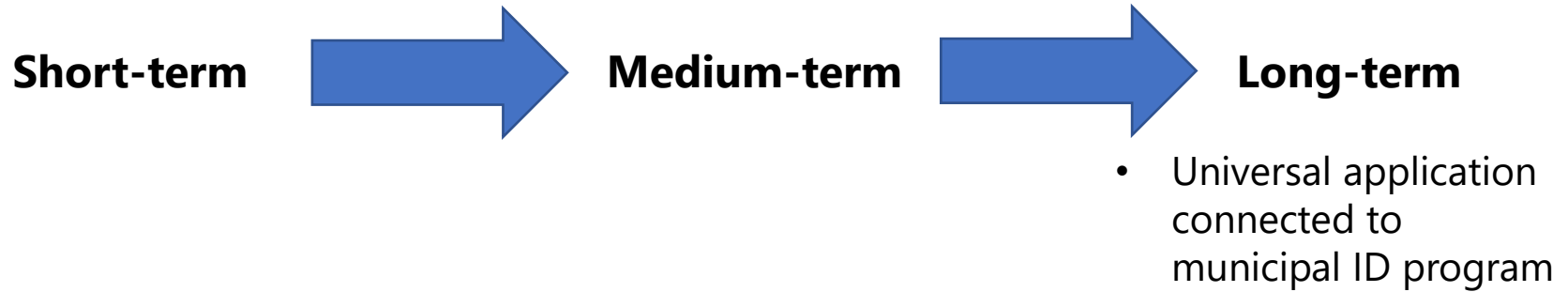
1. Lead Safe Program
2. Citywide Classroom Program
3. St. Joseph County's Emergency Rental Assistance Program
4. Customer Assistance Program

Initial scoping findings:

- Out of 121 questions, only 18 were shared across all four programs.
- Required documentation doesn't match across the four programs, nor do eligibility criteria.
- Insufficient overlap in back-end processes



Project Update 1 - Universal Application



Project Update 1 - Universal Application



- Share utility data for targeted outreach
- Landlord outreach
- Back-end process improvements
- Trimming application length where possible
- Application assistance office hours at the library
- Toolkit for council

Project Update 1 - Universal Application

Short-term



Medium-term



Long-term

- Share utility data for targeted outreach
- Landlord outreach
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- Universal online screening
- Auto-enrollment for programs with shared income eligibility
- Programs refer new enrollees to each other
- Phone banking screening

Project Update 1 - Universal Application

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Medium-term



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Long-term

- Universal application connected to municipal ID program

Data overview from previous Stat meeting

Summarizing data points and statistics from the past quarter related to core operations and delineating key insights

2021 so far

Key insights from breaking down 311 call data

South Bend, Indiana

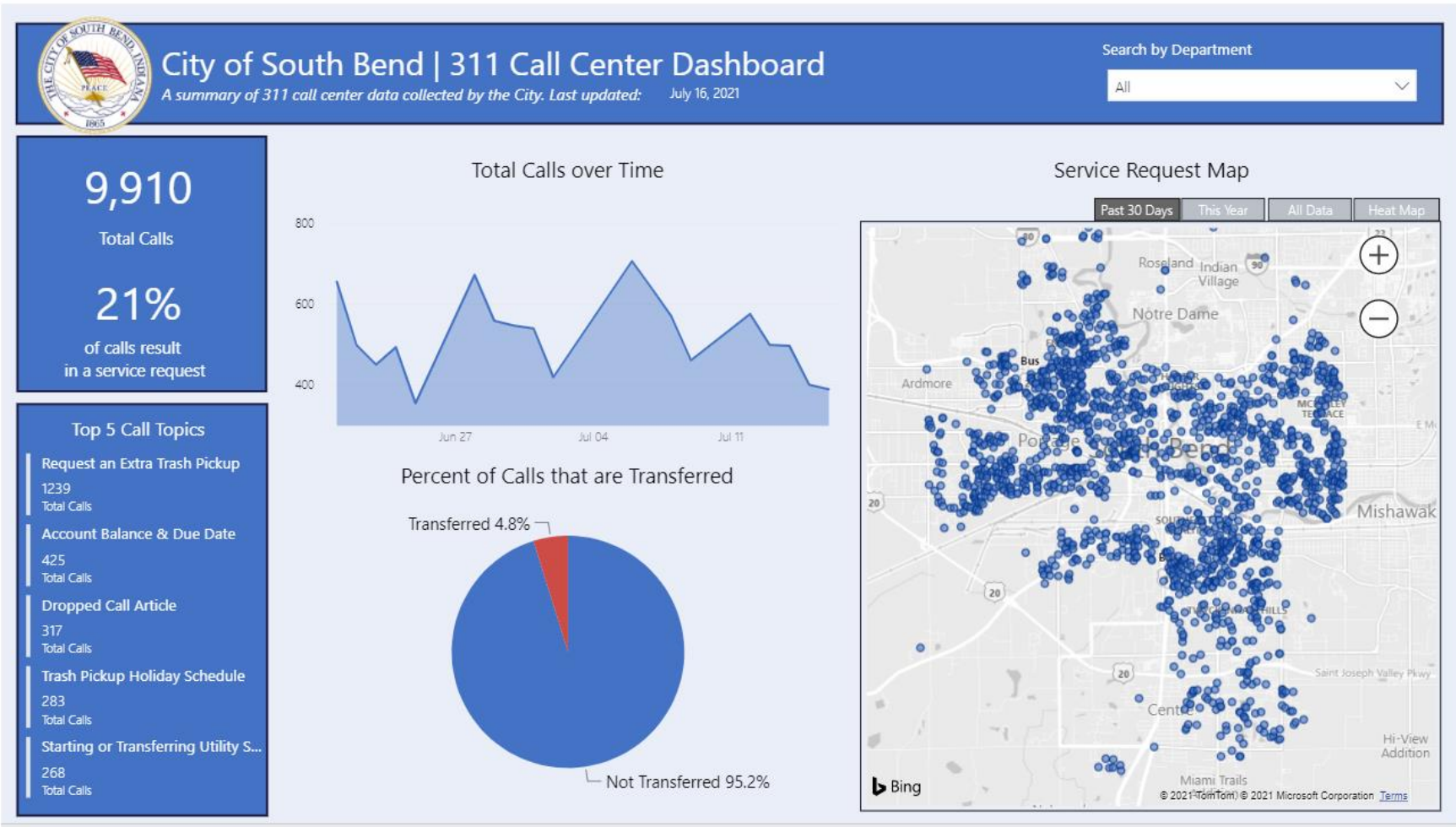
James Mueller

I'M LOOKING FOR...

DEPARTMENTS

COVID-19 RESOURCES & SUPPORT

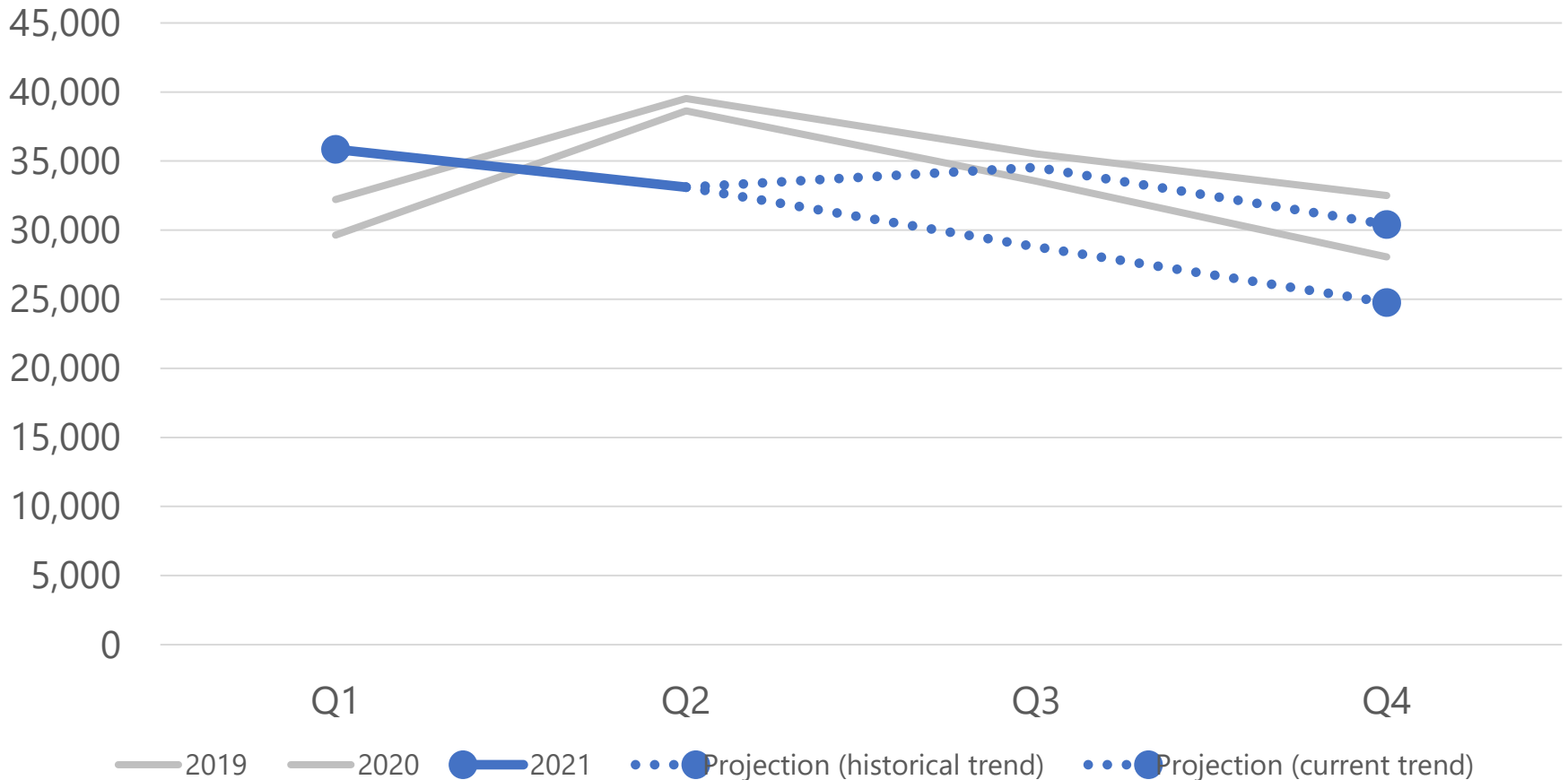
311 CITY SERVICES



2021 Forecast

Projecting historical and current trends onto 2021 data to inform decision-making and planning

If call volume returns to the trends of past years, 2021 will be a middle-of-road year for resident engagement with 311. If call volume continues to come in at a 2021 Q2 rate, we would expect approximately ~25,000 calls total in 2021.



2021 Analysis and Forecast | Service Requests

After a down year in 2020, service requests are back and a bit ahead of the pace set in 2019 (+~500). There are typically ~1,500 less service requests in the second half of the year. In general, fewer service requests are submitted for Council Districts 4, 5, and 6.



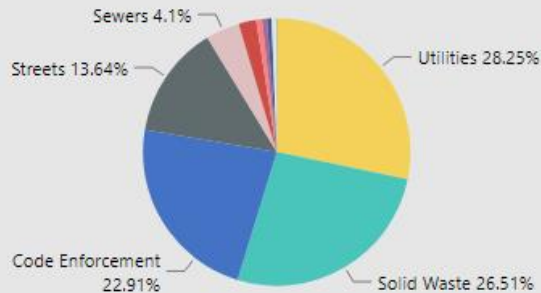
Customer Service Stat | Maps

Breaking down 311 data by geography across the City

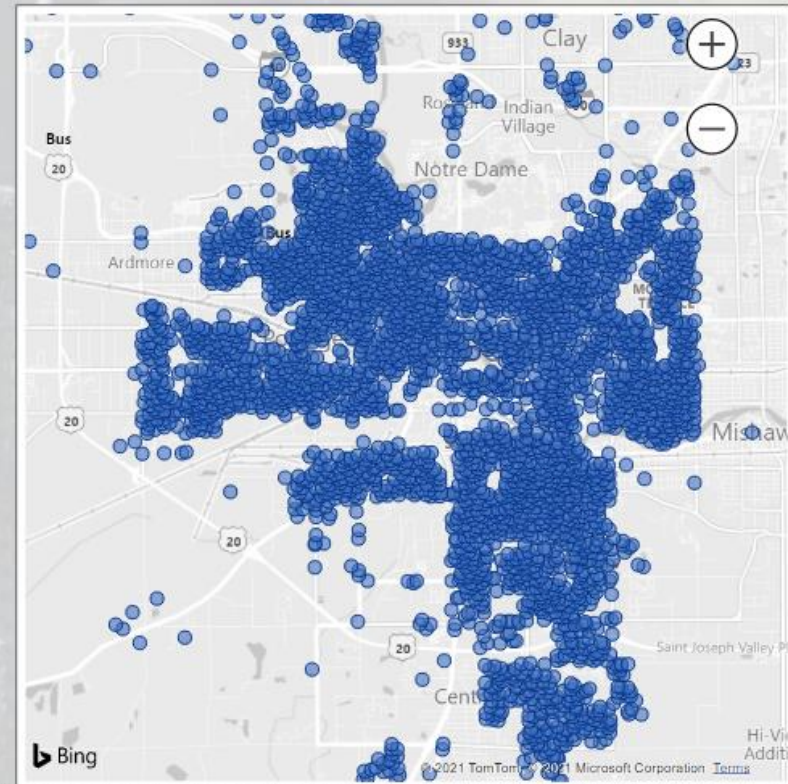
1/1/2021

6/30/2021

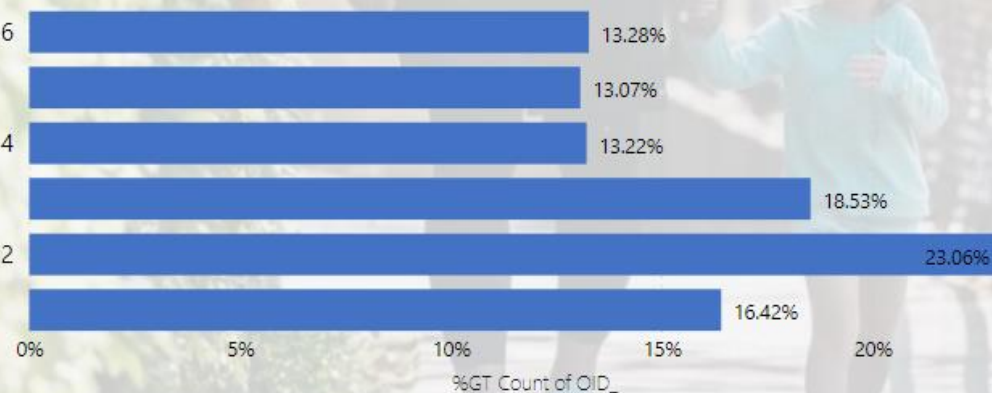
10.81K
Service Requests



Service Request Map



Service Requests by Council District



Quarterly statistics and benchmarks for Q2 Customer Service Stat

27

Data point 1

Number of calls per 100 residents

~2,500

Data point 3



Increase in service requests from 2019/2020 average

7%

Data point 2



Percent of calls that are transferred to another department

3.5%

Data point 4

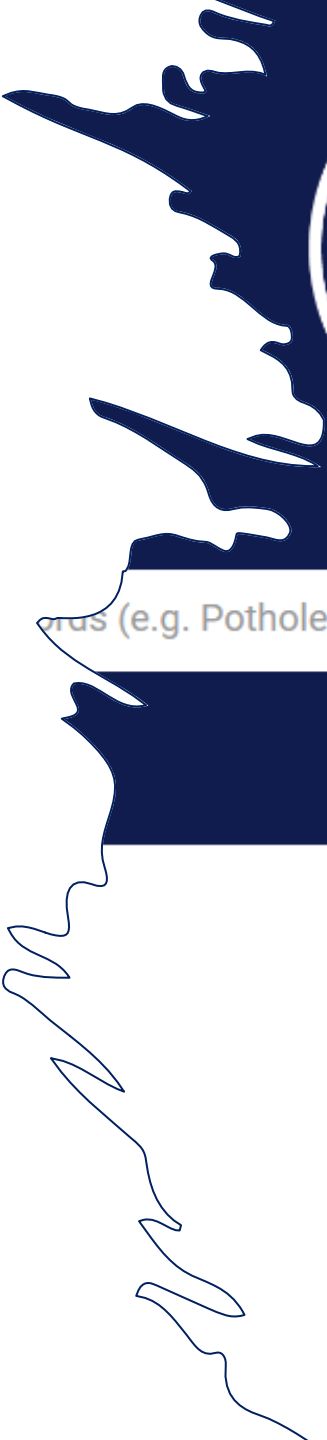


Percent of service requests that are made through the online service portal

Proposed Next Steps

1. Create personas/customer journeys for power users, residents we target for social assistance programs, and residents in low 311-usage Council Districts
 - Inform opportunities for trimming City forms and locations to offer application assistance
2. Monitor KBA usage and support departmental service requests as the City continues to resume pre-pandemic operations

Any other thoughts, ideas, or questions?



YOUR KEY
TO THE CITY

Online Service Portal Strategic Communications

... (e.g. Potholes)

[Learn more about South Bend 311](#)



Search by Service Request ID

Online Service Portal Strategic Communications

Creating evergreen digital content for City communications
and do more for City residents



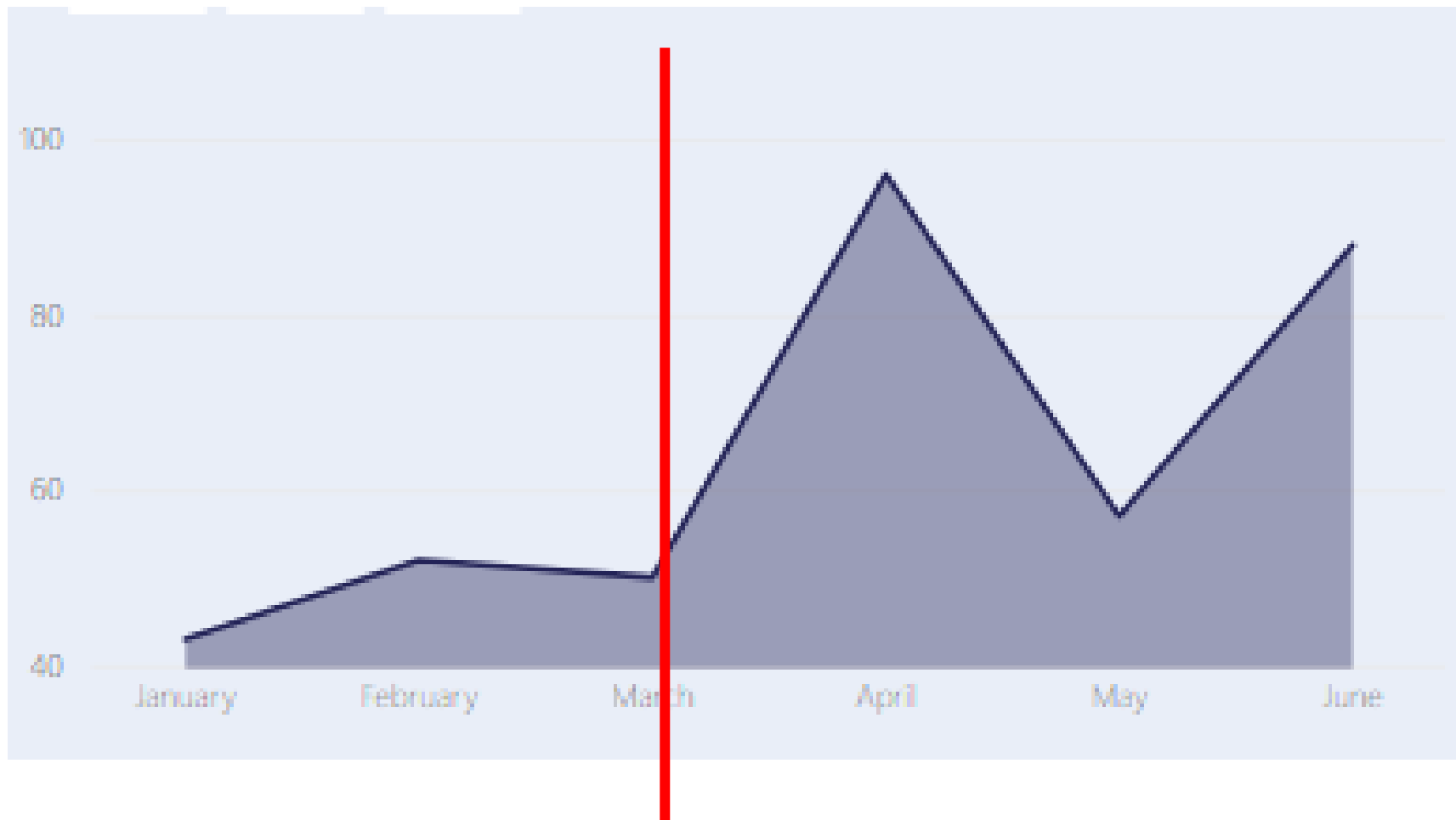
REPORT A POTHOLE ON YOUR STREET

VISIT 311.SOUTHBENDIN.GOV OR CALL 311



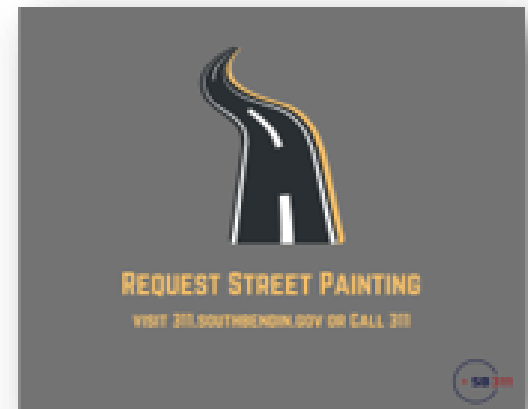
Online Service Portal Strategic Communications

*Over half of 2021 YTD pothole reports for the year came during the month of April
96 out of 386 total 2021 online service requests came during April*



Proposed Next Steps

1. Establish a performance target for service portal usage
 1. Review benchmarks and best practices
2. Develop strategic communications schedule for evergreen content by Q3 Stat (September 2021)



Deep-dive analysis & discussion

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

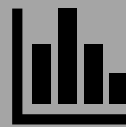
- Customer Service Audit
- Utility Data Update



Customer Service Audit



BACKGROUND /
CONTEXT



AVAILABLE DATA &
ANALYSIS



OPTIONS TO IMPROVE
PERFORMANCE

What are we defining as a "customer service interaction"?

Calling 311 about a pothole

Providing feedback at a budget meeting

Signing up for RSVP

Participating in a neighborhood planning initiative

Signing up your child for VPA swim lessons

Going to the PD academy

Applying for an assistance program

Attending an event at Best Week Ever

Paying a Utility Bill

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Paying a Utility Bill

These are **transactional** in nature and relate to requesting or correcting services provided by the city. They may or may not involve a human (aka "contactless").

Not all engagements with the City are customer service interactions



250 Customer Services: What do we need to know about them?

How can I access these services?

- Online
- In-person
- By phone
- Mail

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Is there a survey or a way to provide feedback?

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Why are these considerations important?

Because we want to know if these services are user friendly for **busy residents**, **residents with reduced access to technology**, **non-English speaking residents**, **residents with reduced access to transportation**, **low-income residents**.

Preliminary findings

46%

Service Availability

Of the 50 services examined, 46% were available by two or more different points of access (online, in-person, mail, phone)

32%

Payment Required

Of the 50 services examined, 32% required payment some or all of the time.

8%

Printer Required

Of the 50 services examined, 8% required a printer to access.

0%

Spanish Availability

Of the 50 services examined, zero had web materials or application materials available in Spanish.

30%

Customer Friendliness

Of the 50 services examined, 30% received the highest possible customer friendliness score.

Early recommendations

1. Translate all web content and applications into Spanish.
2. Make all PDF forms editable so that applicants don't have to have a printer.
3. Service webpages (KBAs) need to be edited for readability, cohesion, and completeness.
4. Services which are only available in-person must develop another point-of-access (online, mail, phone).

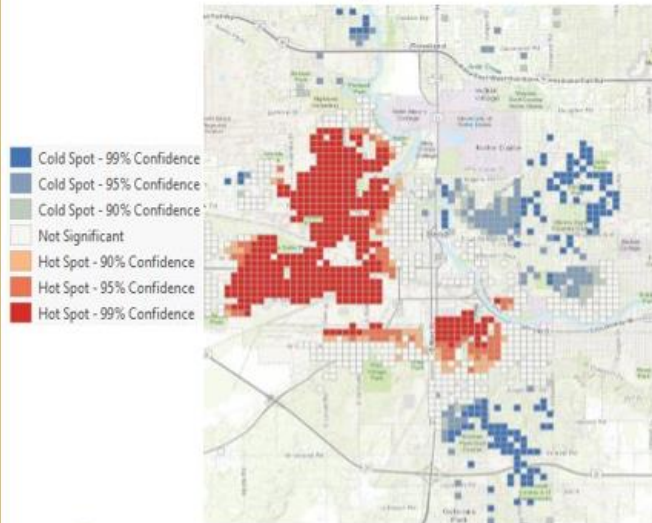
Utility Data Update

COUNTY

Utility data update

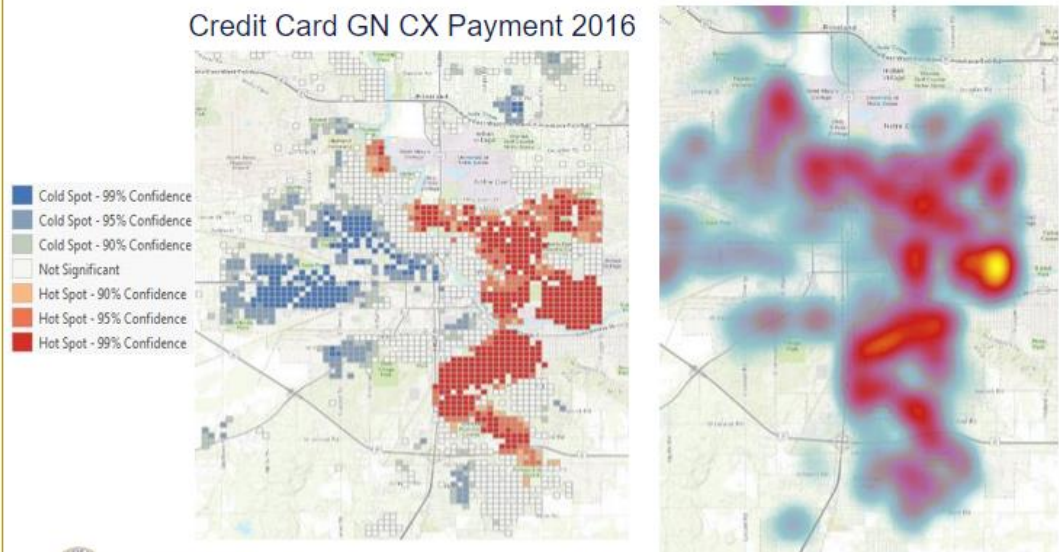
Tender Method/Batch Type Heat Maps

Cash Payment 2016



Tender Method/Batch Type Heat Maps

Credit Card GN CX Payment 2016



2021 Utility Data Update – Cash Payments



Customer Service Stat | Maps

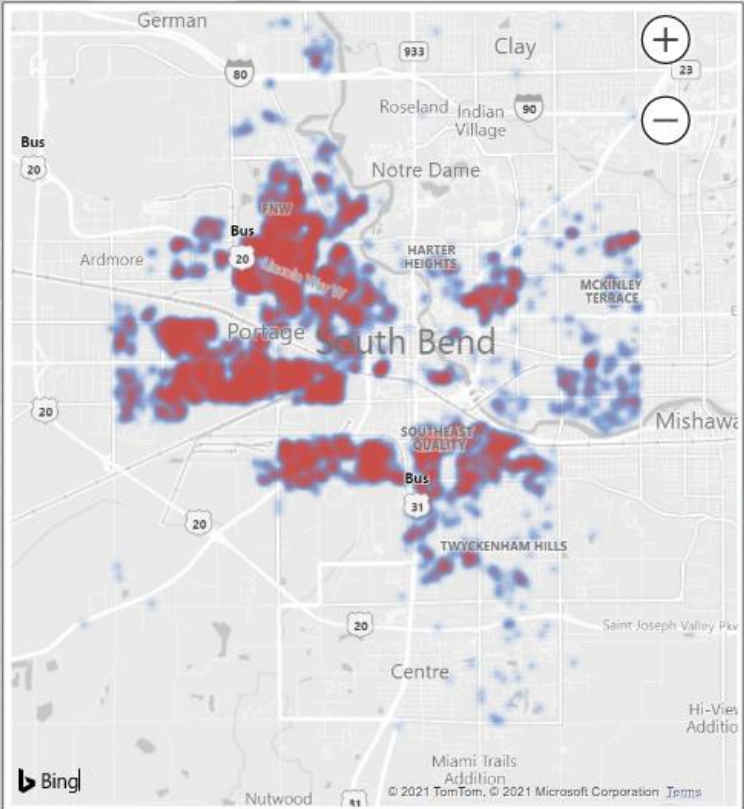
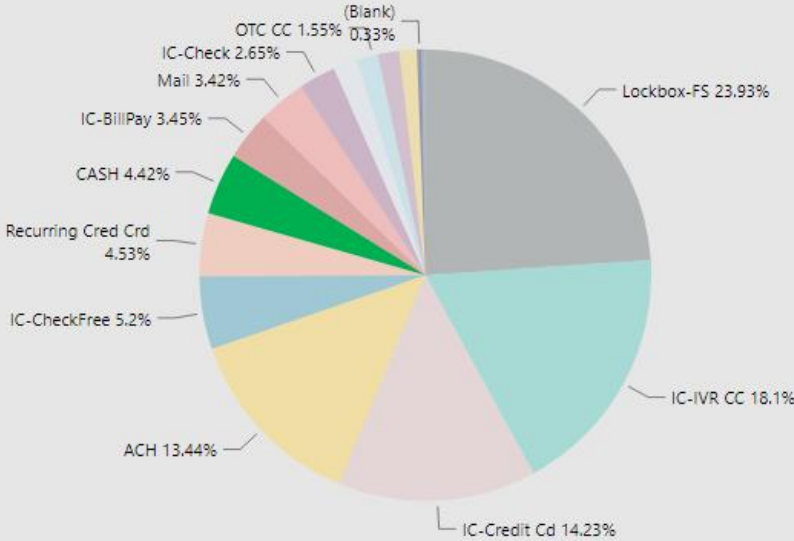
Breaking down utility data by geography across the City

1/1/2021

6/30/2021



8.56K
Utility Payments



Bing

Miami Trails Addition
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2021 Utility Data Update – Credit Card Payments

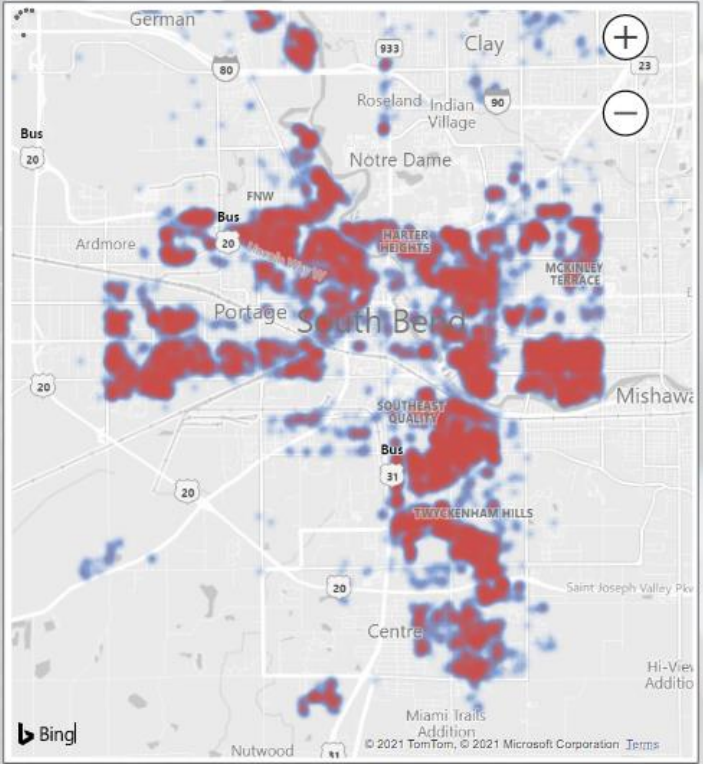
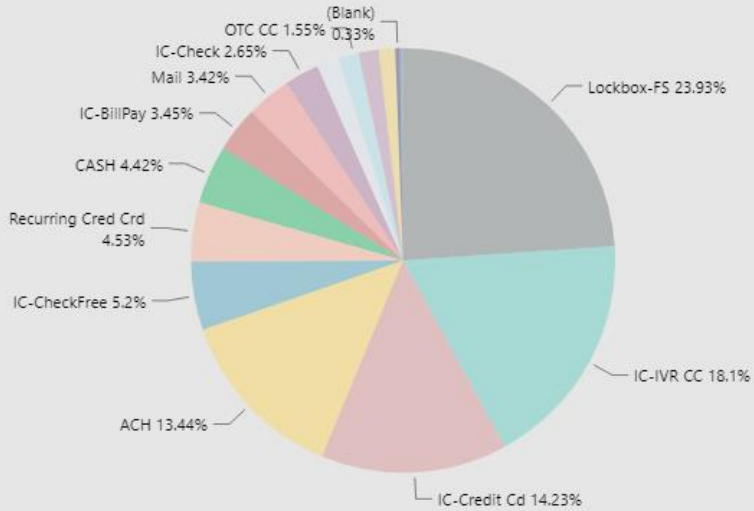


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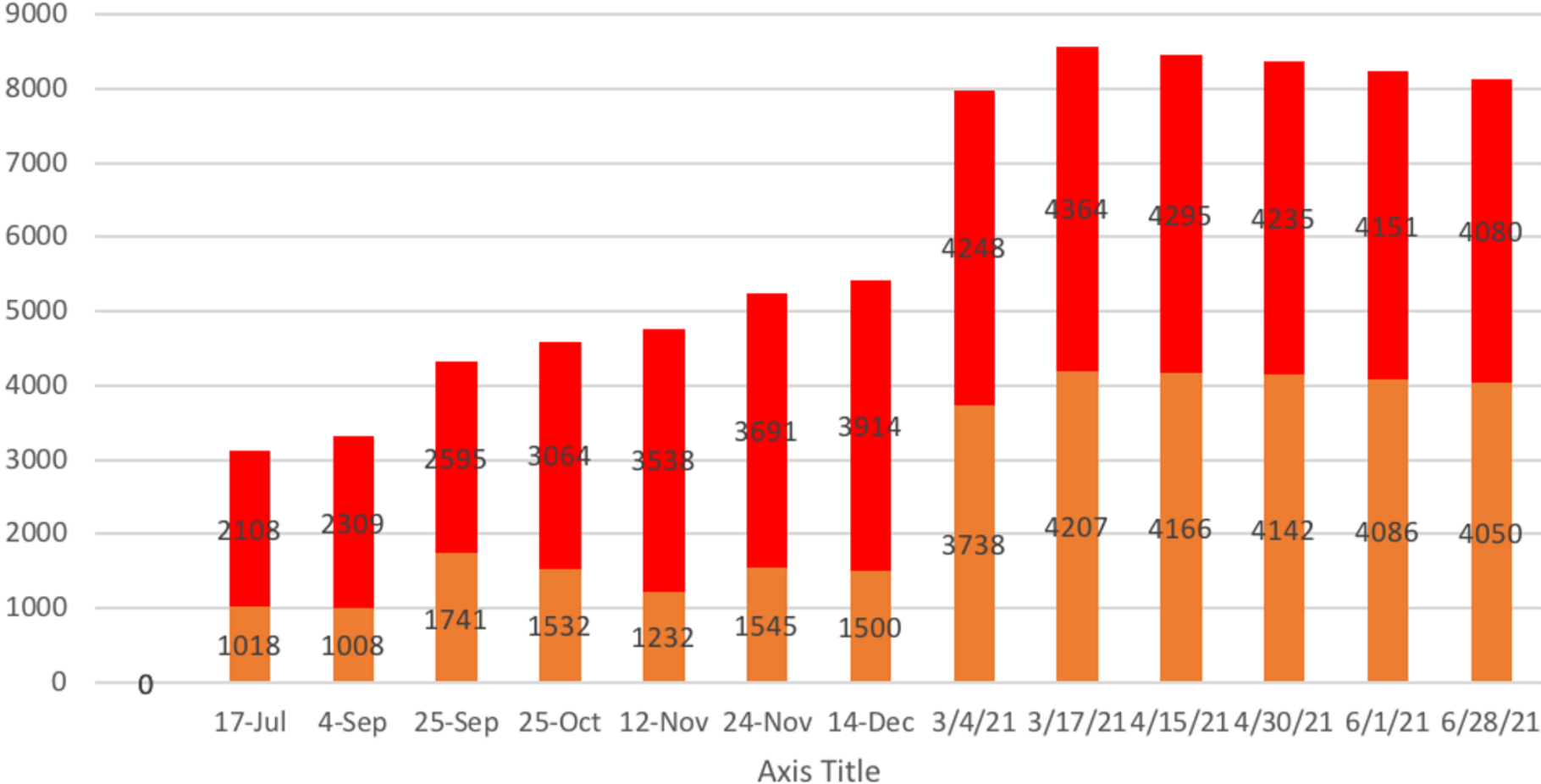
27.54K
Utility Payments



2021 Utility Data Update

Number of delinquent accounts

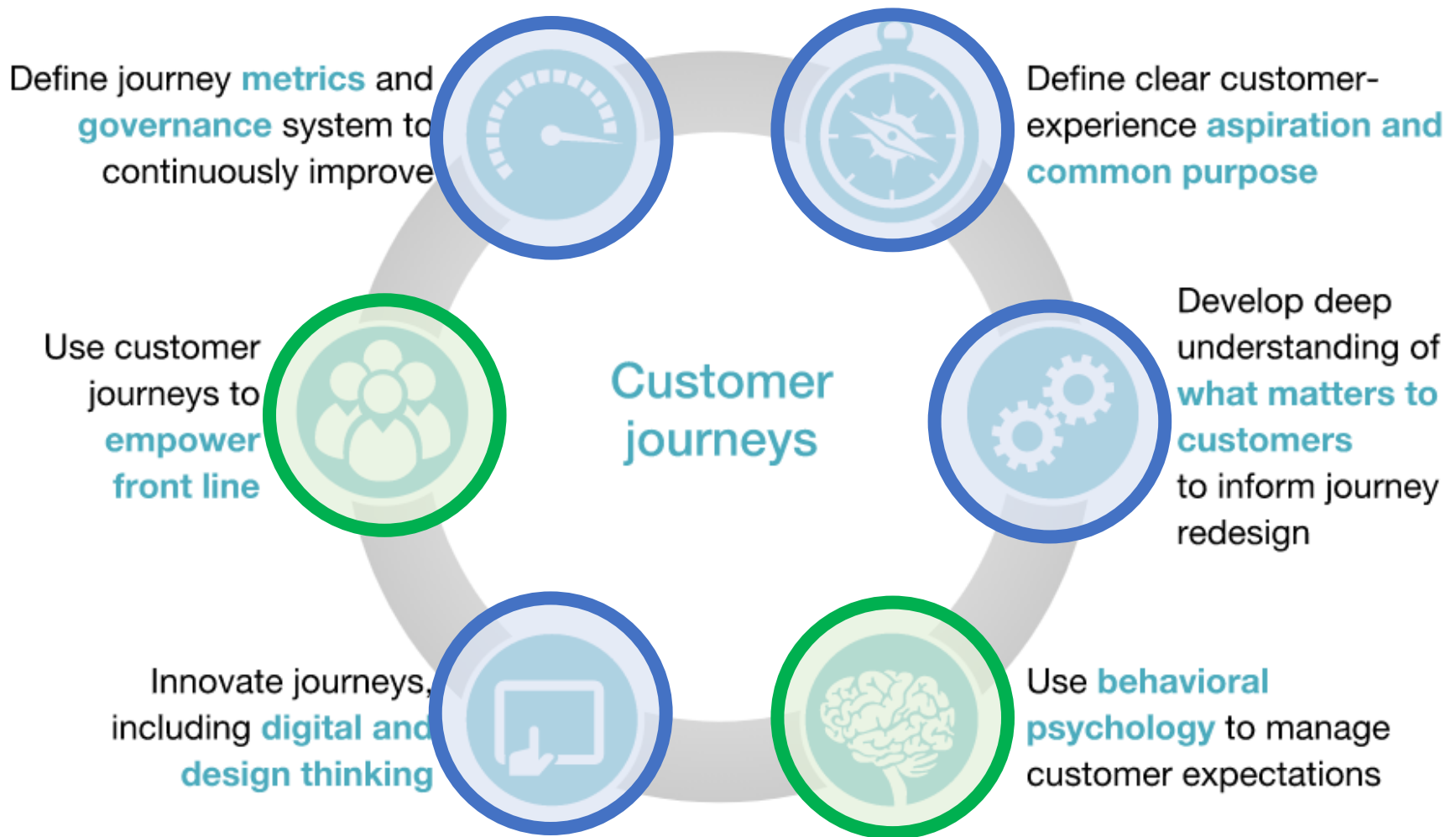
Medium and High Risk Utility Delinquencies Over Time



Taking action

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

Hallmarks of great customer journeys



McKinsey&Company | Source: McKinsey analysis

Taking Action

2021 Q2 Customer Service Stat

Core Operations Support

- Create personas/customer journeys for power users and residents we target for social assistance programs
- Monitor KBA usage and support departmental service requests as the City continues to resume pre-pandemic operations

Online Service Portal Strategic Communications

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Celebrating our values

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

Celebrating our Values

and thank you
to Juliahna!

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Search

Partner with the Kansas
designer for [CiviForm](#)

and empowering



SBStat | Customer Service

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